Research Report

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CLASSIFIED ADVERTISING: READERSHIP AND USE AMONG PURCHASERS OF GENERAL MERCHANDISE AND RECREATION AND LEISURE ITEMS - 1984

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

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INTRODUCTORY NOTE

The summary points and tables presented in this report are based on a mail survey conducted by the National Survey Panel of Paratest Marketing of Eastchester, NY. In February 1984, a screener questionnaire on merchandise purchases and classified readership was mailed to a sample of 20,000 households representing all households of two or more persons in the 48 coterminous states. At the time that returns were closed for tabulation, replies had been received from 11,657 households, or 58.3% of the original mailing.

Those households reporting purchase of one or more of sixteen listed categories of general merchandise or recreation and leisure items within the last six months were mailed follow-up questionnaires. These questionnaires covered the use of newspaper classified advertising in connection with specific kinds of purchases. In all, follow-ups were mailed to 6,987 households; 3,534 households received one questionnaire, and 3,453 received two questionnaires.[1] The follow-up mailing in April 1984 was closed for tabulation in May. By this time completed questionnaires covering 6,759 purchases had been received (64.7% of the 10,440 mailed).

The study was supervised and the research report written by Charles Lehman of NAB's Research Department.

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1) The maximum number of follow-up questionnaires per household was limited to two. If a household reported purchasing items in three or more categories, two of these were randomly selected for follow-up mailings

OVERVIEW

- In a week's time, more than eight out of ten American households check newspaper classified sections. "General Merchandise" is the best read of all classified categories. (Point 1, Table 1, pages 1-4)
- While general merchandise and recreation and leisure items account for hundreds of millions of dollars in annual sales, the market for a particular item at a particular time is very limited--hence the need for regular advertising. (Point 2, Table 2, pages 5-11)
- Purchases of general merchandise items are broadly based. No narrowly defined "target" segment accounts for a major portion of total purchases. This means that general merchandise advertisers need a saturation medium. (Point 3, Table 3, pages 12,13)
- On average, 85% of all purchases of general merchandise and recreation and leisure items are bought from dealers rather than private parties. However, in a few categories like boats or pets most purchases are made from private parties. (Point 4, Table 4, pages 14, 15)
- Four out of ten purchases from dealers involve an initial check of the classified section "to see what was available". One out of six dealer sales result because the buyer contacts the seller through classified advertising. Classified use is even higher among those buying from private parties. (Point 5, Table 5, pages 16,17)
- The percentage who check classified advertising varies with the product category, from 30% to more than 70%. (Point 6, Table 6 pages 18,19)
- Overall, three out of ten purchases involve some follow-up of classified ads. This represents a large majority (74%) of all those who check classified. (Point 7, Table 7, pages 20,21)
- One out of five general merchandise purchases (19%) involve buyers reaching sellers through the newspaper classified section. (Point 8, Table 8, pages 22,23)
- The characteristics of the buyer have relatively little effect on the extent to which classified ads are used and followed up in purchases of general merchandise or recreation and leisure items. (Point 9, Table 9, pages 24,25)

Point 1

In a week's time, more than eight out of ten American households check newspaper classified sections. "General Merchandise" is the most widely read of all classified categories.

In response to a question about household readership of classified advertising over the last seven days, 83% of the 11,657 homemakers completing the screener questionnaire report that someone in their family checked one or more of the six major classifications listed. This proportion was fairly constant for all demographic segments tabulated, ranging only from 78% to 87%.

The "General Merchandise" category was read or looked at in six out of ten households (60%). "General Merchnadise" appears to be the most widely read classification in households of all sizes and in all income brackets and geographic regions. However, in households with homemakers under 25 years old employment ads may have a higher level of readership (58%, vs. 50% for general merchandise in the last seven days).

Classified ads for recreation and leisure items are less widely read than the general merchandise or employment classifications, but one out of four respondents (26%) indicates that the "Recreation and Leisure Items" category was read in their household within the last seven days.

Table 1

Percent of Households Reading Newspaper Classified Advertising Over Past Seven Days, by Demographics

	Net, Any Classified Category	General Merchandise Items	Recreation, Leisure Items
Total responding households	83%	60%	26%
By Census Region:			
Northeast	87%	62%	31%
North Central	85	62	23
South	82	61	25
West	78	52	24
By Age of Homemaker:			
Under 25 years	86%	50%	23%
25-34 years	83	55	23
35-49 years	85	59	24
50-64 years	84	65	29
65 years or older	80	67	29
By Household Income:			
$25,000 & over	83%	59%	27%
$20,000 - $24,999	84	63	27
$15,000 - $19,999	84	59	25
$10,000 - $14,999	83	60	25
Under $10,000	83	60	23
By Size of Family:			
Two persons	82%	62%	28%
Three persons	85	60	25
Four persons	83	57	23
Five or more	86	60	24

Base: Total responding, screener phase
(See Appendix for bases.)

Question: In the last 7 days, which of the following classified ads have you or any family member read or looked at in a daily or Sunday newspaper?

Table 1 (cont.)

Percent of Households Reading Newspaper Classified Advertising Over Past Seven Days, by Demographics

	Employment	Houses, Apts. for Sale/Rent
Total responding households	41%	30%
By Census Region:		
Northeast	44%	33%
North Central	43	29
South	40	30
West	37	27
By Age of Homemaker:		
Under 25 years	58%	39%
25-34 years	47	33
35-49 years	48	28
50-64 years	35	29
65 years or older	18	25
By Household Income:		
$25,000 & over	39%	30%
$20,000 - $24,999	43	28
$15,000 - $19,999	41	29
$10,000 - $14,999	42	30
Under $10,000	46	31
By Size of Family:		
Two persons	32%	28%
Three persons	45	33
Four persons	47	29
Five or more	50	31

Base: Total responding, screener phase
(See Appendix for bases.)

Question: In the last 7 days, which of the following classified ads have you or any family member read or looked at in a daily or Sunday newspaper?

Table 1 (cont.)

Percent of Households Reading Newspaper Classified Advertising Over Past Seven Days, by Demographics

	Used Cars	New Cars
Total responding households	26%	21%
By Census Region:		
Northeast	24%	22%
North Central	26	21
South	26	21
West	26	18
By Age of Homemaker:		
Under 25 years	36%	20%
25-34 years	27	19
35-49 years	27	20
50-64 years	23	23
65 years or older	18	22
By Household Income:		
$25,000 & over	22%	23%
$20,000 - $24,999	27	23
$15,000 - $19,999	27	20
$10,000 - $14,999	27	19
Under $10,000	29	16
By Size of Family:		
Two persons	21%	22%
Three persons	28	20
Four persons	27	20
Five or more	32	20

Base: Total responding, screener phase
(See Appendix for bases.)

Question: In the last 7 days, which of the following classified ads have you or any family member read or looked at in a daily or Sunday newspaper?

Point 2

While general merchandise and recreation and leisure items account for hundreds of millions of dollars in annual sales, the market for a particular item at a particular time is very limited--hence the need for regular advertising.

When asked about their purchases of sixteen categories of general merchandise[1] often advertised in the classified section, 71% of all homemakers report buying items in one or more of these categories within the past six months.

The category of items bought by the largest proportion (32%) is "home repair or improvement materials (lumber, etc.)". This is obviously a very broad category including everything from roofing to plumbing supplies. Even so, if it is assumed that the report is fairly accurate and that all of these buyers made two separate purchases within the categroy during the six-month period (a generous estimate), this would mean in an average week, less than 3% of all households are in the market for any kind of home repair or improvement materials.

For all of the other fifteen listed kinds of merchandise, the percentage buying is considerably smaller, ranging down from 23% for "new furniture" to 1% for "trailer, motor home, camper" during the six-month period. (It should be noted that some of these measures are affected by the timing of the mail survey. If the initial mailing had been made in September rather than February, reported purchases of boats and air conditioners would probably run higher.)

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1) In the text of this report, "general merchandise" denotes "recreation and leisure items" as well.

Table 2

Percent of Households Purchasing General Merchandise or Recreation and Leisure Items, by Demographics

	Any Listed Item	Home Repair, Improvement Materials	New Furniture
Total responding households	71%	32%	23%
By Census Region:			
Northeast	74%	32%	24%
North Central	70	31	22
South	71	31	23
West	70	34	23
By Age of Homemaker:			
Under 25 years	77%	28%	22%
25-34 years	77	35	25
35-49 years	76	34	24
50-64 years	65	30	21
65 years or older	56	23	18
By Household Income:			
$25,000 & over	76%	36%	28%
$20,000 - $24,999	72	35	23
$15,000 - $19,999	69	31	21
$10,000 - $14,999	67	28	18
Under $10,000	64	22	15
By Size of Family:			
Two persons	63%	28%	21%
Three persons	72	32	23
Four persons	77	35	24
Five or more	79	35	23

Base: Total responding, screener phase
(See Appendix for bases.)

Question: Which of the following have you or any member of your family living at home, purchased in the past 6 months?

Table 2 (cont.)

Percent of Households Purchasing General Merchandise or Recreation and Leisure Items, by Demographics

	TV Set	Camera	Computer, Video Monitor, etc.
Total responding households	16%	13%	13%
By Census Region:			
Northeast	18%	17%	15%
North Central	16	12	12
South	16	14	12
West	14	11	13
By Age of Homemaker:			
Under 25 years	21%	17%	13%
25-34 years	15	14	17
35-49 years	18	16	18
50-64 years	15	12	8
65 years or older	14	7	4
By Household Income:			
$25,000 & over	17%	15%	15%
$20,000 - $24,999	15	14	14
$15,000 - $19,999	16	12	13
$10,000 - $14,999	15	12	10
Under $10,000	16	12	8
By Size of Family:			
Two persons	14%	10%	8%
Three persons	16	14	13
Four persons	17	15	18
Five or more	20	18	19

Base: Total responding, screener phase
(See Appendix for bases.)

Question: Which of the following have you or any member of your family living at home, purchased in the past 6 months?

Table 2 (cont.)

Percent of Households Purchasing General Merchandise or Recreation and Leisure Items, by Demographics

	Bicycle	Dog, Cat, Other Pet	Used Furniture
Total responding households	9%	9%	8%
By Census Region:			
Northeast	9%	8%	7%
North Central	7	8	8
South	9	9	7
West	9	9	8
By Age of Homemaker:			
Under 25 years	9%	16%	14%
25-34 years	13	11	9
35-49 years	11	10	7
50-64 years	4	6	6
65 years or older	3	4	5
By Household Income:			
$25,000 & over	9%	8%	6%
$20,000 - $24,999	9	8	7
$15,000 - $19,999	8	8	7
$10,000 - $14,999	7	10	8
Under $10,000	8	10	12
By Size of Family:			
Two persons	4%	6%	6%
Three persons	7	9	8
Four persons	13	11	8
Five or more	15	12	10

Base: Total responding, screener phase
(See Appendix for bases.)

Qeustion: Which of the following have you or any member of your family living at home, purchased in the past 6 months?

Table 2 (cont.)

Percent of Households Purchasing General Merchandise or Recreation and Leisure Items, by Demographics

	Washer &/or Dryer	Antiques	Power Mower
Total responding households	8%	6%	3%
By Census Region:			
Northeast	8%	6%	3%
North Central	7	6	2
South	8	5	4
West	7	6	2
By Age of Homemaker:			
Under 25 years	14%	4%	2%
25-34 years	8	5	2
35-49 years	8	7	3
50-64 years	7	6	3
65 years or older	5	4	3
By Household Income:			
$25,000 & over	7%	7%	3%
$20,000 - $24,999	7	5	3
$15,000 - $19,999	8	5	2
$10,000 - $14,999	8	4	3
Under $10,000	9	4	2
By Size of Family:			
Two persons	6%	6%	3%
Three persons	8	6	3
Four persons	8	5	2
Five or more	9	4	3

Base: Total responding, screener phase
(See Appendix for bases.)

Question: Which of the following have you or any member of your family living at home, purchased in the past 6 months?

Table 2 (cont.)

Percent of Households Purchasing General Merchandise or Recreation and Leisure Items, by Demographics

	Air Conditioner	Motorcycle or Moped
Total responding households	2%	2%
By Census Region:		
Northeast	2%	1%
North Central	2	2
South	2	2
West	1	2
By Age of Homemaker:		
Under 25 years	1%	2%
25-34 years	2	2
35-49 years	2	2
50-64 years	2	1
65 years or older	3	1
By Household Income:		
$25,000 & over	2%	2%
$20,000 - $24,999	1	2
$15,000 - $19,999	2	1
$10,000 - $14,999	2	1
Under $10,000	2	2
By Size of Family:		
Two persons	2%	1%
Three persons	2	1
Four persons	1	2
Five or more	1	2

Base: Total responding, screener phase
(See Appendix for bases.)

Question: Which of the following have you or any member of your family living at home, purchased in the past 6 months?

Table 2 (cont.)

Percent of Households Purchasing General Merchandise or Recreation and Leisure Items, by Demographics

	Piano or Organ	Boat &/or Boat Motor	Trailer Motor Home, Camper
Total responding households	1%	1%	1%
By Census Region:			
Northeast	1%	1%	1%
North Central	1	1	1
South	2	2	1
West	1	1	2
By Age of Homemaker:			
Under 25 years	2%	1%	1%
25-34 years	2	1	1
35-49 years	2	1	1
50-64 years	1	2	2
65 years or older	1	1	2
By Household Income:			
$25,000 & over	2%	2%	1%
$20,000 - $24,999	1	1	2
$15,000 - $19,999	2	1	1
$10,000 - $14,999	1	1	2
Under $10,000	1	1	1
By Size of Family:			
Two persons	1%	1%	1%
Three persons	1	1	1
Four persons	2	2	1
Five or more	2	1	1

Base: Total responding, screener phase
(See Appendix for bases.)

Question: Which of the following have you or any member of your family living at home, purchased in the past six months?

Point 3

Purchases of general merchandise items are broadly based. No narrowly defined "target" segment accounts for a major portion of total purchases. This means that general merchandise advertisers need a saturation medium.

"Market segmentation" is currently a very popular concept. The essence ~~of~~ this idea is that the great majority of an advertiser's most important customers can be found within a fairly small group that can be defined by demographics, "psychographics" or a combination of the two. This concept is misleading even in the fields of package goods and media selection, where it is most applicable. It is totally unsuitable for most kinds of general merchandise.

The "washer &/or dryer" category can serve as an example of the shortcomings of market segmentation. Purchase data for this category show that homemakers under 25 years old are at least 75% more likely than any other age group to buy a washer or dryer (Table 3). Doesn't this mean that sellers should target all of their advertising efforts at this age group? Any seller who does so would be making a big mistake, because homemakers under 25 represent only 6% of all homemakers, and their purchases of washers and dryers represent only 11% of total purchases.

Only 7% of the homemakers between 50 and 64 years old report washer or dryer purchases (as compared with 14% of those under 25), but they account for 25% of all the purchases, because the 50- to 64-year-old homemakers ~~outnumber~~ the youngest homemakers by four to one.

Table 3

Washer &/or Dryer Purchases in Past Six Months, Incidence vs. Share of Purchases, by Age of Purchaser

	Respondent Distribution	Percent Purchasing	Percent of Total Purchases[a)]
Age of Homemaker:			
Under 25 years	6%	14%	11%
25 - 34 years	25	8	27
35 - 49 years	30	8	30
50 - 64 years	27	7	25
65 years or older	12	5	7

a) Estimate assumes only one washer &/or dryer purchases per household within six-month period reported on.

Point 4

On average, 85% of all purchases of general merchandise and recreation and leisure items are bought from dealers rather than private parties. However, in a few categories like boats or pets, most purchases are made from private parties.

Responses to the follow-up questionnaires mailed to those reporting purchase indicate that 85% of all general merchandise items are bought from dealers.[1] This percentage varies a great deal for individual kinds of purchases, ranging from as low as 17% for "dog, cat, other pet" to as high as 96% for "new furniture". However, private party sales account for more than half of the total in only four of the sixteen listed kinds of merchandise. Besides pets, these are antiques, used furniture, and boats or boat motors.

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1) Overall, 8% of the 6,759 completed follow-up questionnaires failed to answer the question about whether items were bought from dealers or private parties. This suggests that some of those reporting purchases in the screener questionnaire may have acquired items in some other way, perhaps as gifts or premiums. The "no-answer" group has been omitted from tables 4 through 9.

Table 4

Whether Item Was Bought From Dealer or Private Party

	Base= 100%[a]	Bought From:	
		Dealer	Private Party
All items purchased	(6,222)	85%	15%
New furniture	(1,120)	96	4
Used furniture	(255)	28	72
Antiques	(223)	45	55
Air conditioner	(73)	85	15
Washer &/or dryer	(318)	85	15
Piano or organ	(50)	74	26
TV set	(775)	94	6
Computer, video monitor, etc.	(581)	95	5
Home repair, improvement materials	(1,595)	94	6
Power mower	(97)	84	16
Bicycle	(313)	88	12
Motorcycle or moped	(62)	55	45
Boat &/or boat motor	(52)	42	58
Camera	(450)	96	4
Trailer, motor home, camper	(52)	54	46
Dog, cat, other pet	(206)	17	83

a) Excludes cases with "no answer" to question about where item was bought.

Question: Did you (or some other member of your household) buy the ______ (ITEM) from a private party, or from a dealer or store?

Point 5

Four out of ten purchases from dealers involved an initial check of the classified section "to see what was available". One out of six dealer sales result because the buyer contacts the seller through classified advertising. Classified use is even higher among those buying from private parties.

Dealers can advertise their merchandise in a number of ways, including ROP display ads in newspapers, inserts, direct mail, hand-delivered circulars, and TV and radio commercials. In view of the variety of information sources available to consumers, it might seem unnecessary for anyone considering a general merchandise purchase to check the newspaper classified section. Nevertheless, 39% of all homemakers buying merchandise from dealers say that they looked at classified ads beforehand to see what was available.

In comparison to other advertising media, the newspaper classified section probably has a higher potential for converting readers to buyers. In fact, many readers turn to the classified section because they are considering a purchase. In three out of four cases where classified ads are checked, readership is followed up by a phone call or a personal visit. More often than not, these follow-ups lead to purchase. One fifth (19%) of all general merchandise purhcases occur because the buyer located the seller through a classified ad.

Table 5

Use of Classified Advertising for Purchases Of General Merchandise, Recreation and Leisure Items

	Total Purchases*	Bought From: Dealer	Bought From: Private Party
Checked classified before purchase	41%	39%	57%
Followed up classified	31	28	44
Reached seller through classified	19	17	30
Base:	(6,222)	(5,296)	(926)

* Excludes those cases with "no answer" to question about where item was bought.

Point 6

The percentage who check classified advertising varies with the product category, from 30% to more than 70%.

The percentage of purchases that involve checking classified advertising "to see what was available" shows a great deal of variation for the sixteen prelisted categories of general merchandise, from 30% for "camera" to 75% for "trailer, motor home, camper".

These considerable differences in the use of classified from item to item do not necessarily reflect the level of consumer willingness to use classified for particular kinds of information. Instead, this may simply show the extent to which certain kinds of merchandise are listed separately, rather than being lumped together under the heading "General Merchandise" or "Things for Sale".

In fact, consumers appear to be most likely to check classified advertising for information about the kinds of merchandise that many newspapers list under separate headings: boats and motors, motorcycles, pets, used furniture and pianos or organs ("musical instruments").

Table 6

Prepurchase Readership of Classified Advertising by Purchasers of Listed Items

	Base = 100%[a]	Looked at Classified Advertising
All items purchased	(6,222)	41%
New furniture	(1,120)	41
Used furniture	(255)	56
Antiques	(223)	39
Air conditioner	(73)	44
Washer &/or dryer	(318)	44
Piano or organ	(50)	56
TV set	(775)	36
Computer, video monitor, etc.	(581)	37
Home repair, improvement materials	(1,595)	43
Power mower	(97)	40
Bicycle	(313)	38
Motorcycle or moped	(62)	55
Boat &/or boat motor	(52)	71
Camera	(450)	30
Trailer, motor home, camper	(52)	75
Dog, cat, other pet	(206)	55

Question: Before buying, did you (or some other member of your household) look at the classified ads to see what was available, even if you didn't buy through the classified?

a) Excludes cases with "no answer" to question about where item was bought.

Point 7

Overall, three out of ten purchases involve some follow-up of classified ads. This represents a large majority (74%) of all those who check classified.

In general, the percentage of purchases involving the follow-up of classified advertising closely parallels the proportion of cases in which classified was checked in the first place. The highest percentage of purchases involving classified follow-up is "trailer, camper, motor home", at 65%; the lowest is "camera", at 22%. (As shown under Point 6, the same two categories of items ranked highest and lowest on prepurchase readership of classified.)

Among those who check classified before purchase, three out of four (74%) follow up one or more ads. This proportion also varies from category to category, but in a somewhat narrower range, from 61% for "bicycle" and "piano or organ", to 87% for "trailer, camper, motor home".

Table 7

Prepurchase Follow-up of Classified Advertising

	Percent of:	
	Total Purchasers	Those Checking Classified
All items purchased	31%	74%
New furniture	30	73
Used furniture	44	78
Antiques	27	70
Air conditioner	33	76
Washer &/or dryer	31	69
Piano or organ	34	61
TV set	28	77
Computer, video monitor, etc.	24	64
Home repair, improvement materials	33	78
Power mower	34	85
Bicycle	23	61
Motorcycle or moped	42	77
Boat &/or boat motor	58	81
Camera	22	74
Trailer, camper, motor home	65	87
Dog, cat, other pet	41	75

Question: Did you follow up on any of the ads you saw, either by phoning or going to see about what was advertised in the classified section?

Point 8

One out of five general merchandise purchases (19%) involve buyers reaching sellers through the newspaper classified section.

Even though buyers of general merchandise items have many ways of reaching the dealers and private parties offering various kinds of goods for sale, the newspaper classified section provided a vital link for one out of five purchases (19%). This represents nearly half of the cases (46%) in which classified advertising was checked "to see what was available".

Variations from category to category in the proportion of buyer-seller contacts made through the classified section probably reflect the relative dominance of dealers versus private party sellers in that category. Items that are likely to be bought from private parties (boats and motors, used furniture, pets) show the highest proportions of buyers reaching sellers through newspaper classified.

Table 8

Purchasers Contacting Dealer or Other Seller Through Classified Advertising

	Percent of:	
	Total Purchasers	Those Checking Classified
All items purchased	19%	46%
New furniture	18	43
Used furniture	29	51
Antiques	16	40
Air conditioner	16	38
Washer &/or dryer	17	39
Piano or organ	14	25
TV set	17	47
Computer, video monitor, etc.	14	39
Home repair, improvement materials	22	52
Power mower	20	49
Bicycle	14	36
Motorcycle or moped	21	38
Boat &/or boat motor	33	46
Camera	16	55
Trailer, camper, motor home	31	41
Dog, cat, other pet	27	49

Question: Did you get to the store or person you bought from through the classified?

Point 9

The characteristics of the buyer have relatively little effect on the extent to which classified ads are used and followed up in purchases of general merchandise or recreation and leisure items.

Tables 6, 7 and 8 show that there is considerable variation in the extent to which classified advertising is used in the purchase of different kinds of general merchandise items. It might be assumed that the use of "general merchandise" classified categories would also be affected by the demographic characteristics of purchasers. In fact, Table 9 indicates that general merchandise purchasers in different population segments show only limited variation in their use of classified.[1]

One small difference might be noted: Purchasers with high family incomes may be somewhat less likely to consult, follow up or buy through the classified section when purchasing general merchandise items. Perhaps this is because some potential buyers with large disposable incomes automatically rule out the idea of dealing with private parties or buying "used" merchandise.

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1) Readership of other classified categories can show considerable differences among segments. For example, in Table 1, see readership figures for the "Employment" classification by age of homemaker and size of family.

Table 9

Use of Classified Advertising for Items Purchased, by Demographics

	Base: = 100%	Use of Classified Ads: Looked At	Followed Up	Brought Through
All items purchased	(6,222)[a]	41%	31%	19%
By Sex:				
Male	(1,183)	42%	31%	20%
Female	(5,249)	40	30	19
By Age:				
Under 25 years	(417)	44%	30%	18%
25-34 years	(1,794)	40	28	19
35-49 years	(2,100)	39	30	18
50-64 years	(1,645)	43	33	21
65 years or older	(553)	37	28	18
By Education:				
Elementary school	(97)	37%	31%	16%
High school	(3,220)	44	33	21
College	(3,182)	37	33	16
By Household Income:				
$25,000 & over	(2,883)	35%	26%	16%
$20,000 - $24,999	(1,048)	43	31	19
$15,000 - $19,999	(977)	40	28	18
$10,000 - $14,999	(1,019)	42	32	19
Under $10,000	(832)	45	35	22
By Market Size:				
2 million & over	(1,761)	36%	27%	18%
500,000 - 1,999,999	(1,823)	38	28	17
50,000 - 499,999	(1,333)	41	31	20
Non-metropolitan	(1,842)	42	30	18
By Census Region:				
Northeast	(1,531)	38%	29%	19%
North Central	(1,901)	41	30	20
South	(2,070)	40	28	17
West	(1,257)	37	26	16

a) Excludes those who failed to answer question on where item was bought.

APPENDIX

Demographics of Purchaser Households

Use of Classified Advertising, by Market Size

Screener Questionnaire

Follow-up Questionnaire

Demographics of Purchaser Households
(from Screener Questionnaire)

	Number	Percent
Total purchasing households	11,657	100.0%
By Age of Homemaker:		
Under 25 years	679	5.8%
25-34 years	2,947	25.3
35-49 years	3,521	30.2
50-64 years	3,166	27.2
65 years or older	1,344	11.5
By Family Income:		
$25,000 or more	4,496	38.6%
$20,000 - $24,999	1,777	15.2
$15,000 - $19,999	1,721	14.8
$10,000 - $14,999	1,893	16.2
Under $10,000	1,770	15.2
By Size of Family:		
Two persons	4,487	38.5%
Three persons	2,729	23.4
Four persons	2,544	21.8
Five persons or more	1,897	16.3
By Census Region:		
Northeast	2,682	23.0%
North Central	3,301	28.3
South	3,670	31.5
West	2,004	17.2
By Market Size:		
2 million and over	3,069	26.3%
500,000 - 1,999,999	3,149	27.0
50,000 - 499,999	2,249	19.3
Non-SMSA (under 50,000)	3,190	27.4

Use of Classified Advertising for Purchases of General Merchandise, Recreation and Leisure Items, by Market Size

	Base: Total Items*	Use of Classified: Checked	Followed Up	Bought Through
Total items	6,759	39%	29%	18%
Market Size:				
2 million and over	1,761	36	27	18
500,000 - 1,999,999	1,823	38	28	17
50,000 - 499,999	1,333	41	31	20
Non-SMSA (under 50,000)	1,842	42	30	18

* Note that figures shown here differ slightly from those in Table 5, because the table above includes cases where the seller was not identified as either a dealer or a private party.

Screener Questionnaire

1. Which of the following have you or any member of your family, living at home, purchased in the past 6 months? (CHECK ALL THAT APPLY)

Furniture, new........( )
Furniture, used.......( )
Antiques..............( )

Air conditioner.......( )
Washer &/or dryer.....( )
Piano or organ........( )

TV set................( )
Computer,
  video monitor, etc..( )
Home repair or
  improvement materials
  (lumber, etc.)......( )

Power mower...................( )
Bicycle.......................( )
Motorcycle or moped...........( )

Boat &/or boat motor..........( )
Camera........................( )
Trailer, motor home,
  camper......................( )

Dog, cat or other pet.........( )

None of these.................( )

2. In the last 7 days, which of the following classified ads have you or any family member read or looked at in a daily or Sunday newspaper? (CHECK ALL THAT APPLY)

Houses/apt. for
  sale or rent........( )

Employment............( )

New cars..............( )

Used cars.............( )

Recreation, leisure items......( )

General merchandise items......( )

None of these..................( )

Follow-Up Questionnaire

PLEASE ANSWER THE FOLLOWING QUESTIONS
ABOUT THE _____ (ITEM) YOU PURCHASED
WITHIN THE PAST SIX MONTHS.

1. Did you (or some other member of your household) buy it from a private party, or from a dealer or store?

   ( ) Private Party ( ) Dealer or store

2. About how far in advance did you definitely plan to buy before you made the actual purchase?

   ( ) Two months or more
   ( ) About one month
   ( ) Two to three weeks
   ( ) About one week
   ( ) Three or four days
   ( ) No advance planning, came across a good buy

3. Before buying, did you or someone else in your family look at the classified ads to see what was available, even if you didn't buy through the classified?

   ( ) YES ( ) NO - SKIP TO QUESTION 6

4. If YES, did you follow up on any of the ads you saw, either by phoning or going to see about what was advertised in the classified section?

   ( ) YES ( ) NO - SKIP TO QUESTION 6

5. If YES, did you get to the store or person you bought from through the classified ads?

   ( ) YES ( ) NO

6. On the average, about how often would you say you look at classified ads for merchandise for sale, including recreation and leisure items, even if you don't have any actual plans to buy at the time?

   ( ) Almost every time I look at a newspaper
   ( ) Most of the time
   ( ) About half the time
   ( ) Once in a while
   ( ) Hardly ever

7. Have you (or some other member of your household) ever placed a classified ad in a newspaper?

   ( ) YES ( ) NO

8. If YES, have you placed a classified ad within the past six months or so?

   ( ) YES ( ) NO

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Research Report

Newspaper Advertising Bureau, Inc. 1180 Avenue of the Americas, New York, New York 10036

The Readership of
Newspaper Pages and Sections:
Demographic Segments

SMRB SMM--1984

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the Newspaper business and its advertisers. These reports provide the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

January 1984

Source: 1984 Study of Media and Markets,
Simmons Market Research Bureau, Inc.

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INTRODUCTORY NOTE	i

Types of Daily Newspaper Pages or Sections Usually Read By:	Table Number for: Adults	Males	Females
Totals	1	1	1
Age	2	3	4
Education	5	6	7
Household Income	8	9	10
Employment Status	11	12	13
Occupation	14	15	16
Marital Status	17	18	19
Number of People in Household	20	21	22
Locality Type	23	24	25

INTRODUCTORY NOTE

Measures of media exposure vary with the method of measurement used, whether the medium in question is print or broadcast. For this reason, all those who use media exposure figures should understand exactly how the data were collected.

The figures in this report are from the 1984 Simmons Study of Media and Markets. They were obtained in personal interviews with a multi-stage area probability sample of more than 19,000 adults. Every respondent who reported reading one or more daily newspapers within the past seven days was asked:

> "When you read or look into (NAME NEWSPAPER), do you generally read or look at every page of the entire newspaper, or do you tend to read or look at only some pages or sections?"

Those who say that they read or look at "only some pages or sections" were shown a card listing ten categories of content carried by the great majority of daily newspapers, as shown in the tables following, and asked:

> "Which of the numbers on this card describe the pages or sections in (NAME NEWSPAPER) you generally read or look at?"

The most important finding emerging from this approach is that six out of ten adult readers (62%)[1] indicate that they usually see every page of the newspaper they read. This does not mean they read every item, but

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1) Research by Audits & Surveys, Inc. (1982) reported that 67% of adult readers go through the paper "page by page".

since the human eye is a very efficient scanning device, they have the opportunity to be exposed to any editorial or advertising content appearing in the issue.

In a 1982 study conducted by Audits and Surveys, inc., a nationwide sample of adults was taken through sampled pages of newspapers read on the day before the interview. Findings from this part of the A&S study suggest that the SMRB figures shown in this report are roughly equivalent to "page opening." Overall, A&S estimated average page opening at 77%--that is, the average page (or spread) in a daily newspaper is opened by 77% of all those reading the issue.

For the minority who were directly questioned by SMRB's interviewers about specific kinds of content, the figures obtained are probably close to "true" readership figures. Those who wish to estimate how these more selective readers respond to particular kinds of content can do so by subtracting the percentage shown for "usually read every page" and dividing by "read certain pages or sections."

> EXAMPLE: In Table 1, the figure shown for "business, finance" is 76%. Subtracting the 62% who usually read every page leaves a remainder of 14%. Dividing this by the 38% who only read certain pages or sections yields 37%, the proportion of those specifically asked about "business, finance" who say that they usually read that page or section. The proportions for selective male (41%) and female (30%) readers indicate a larger difference between the sexes than the overall "readership" or "page opening" figure suggests.

Within any given demographic segment the figures shown in these tables may reasonably be assumed to show the relative level of interest in a specific kind of content. However, any differences found between demographic segments should be interpreted with caution, since these are affected mainly by the percentages who report reading or looking at every page. For example, Table 2 might suggest that adults who are 65 or older are just as interested in "entertainment" pages as those who are 18 to 24. This is only because more older readers report reading every page.

The fairly constant level of page opening for "entertainment" content shown in these SMRB tables might be contrasted with one of the results of a card-sorting game in the 1982 A&S research. The 25 cards used included 21 kinds of editorial content and 4 kinds of ads. In response to this part of the survey, 89% of all newspaper readers between 18 and 24 indicate that they usually read "movie ads," as compared with only 24% of those who are 65 or older. This pattern of higher interest in movie ads among young adults is consistent with other research on movie attendance.

Although different approaches to measuring the elusive concept called "readership" may yield very different results, divergent findings can be equally valuable so long as the user understands exactly how those findings were obtained and what they imply.

In Tables 17 through 19, the percentages shown for "usually read every page" reflect the fact that most of the dailies read in central cities tend to have many more pages than those read in non-metropolitan areas. Large central city newspapers also have more specialized pages and sections. The Audits and Surveys, Inc. study cited earlier indicates that the average central city reader may open to more pages than the average non-metropolitan reader has in his entire newspaper.

Table 1

Types of Daily Newspaper Pages or Sections Usually Read
(Total Adults, by Sex)

	Percent of Weekday Audience		
	Adults	Males	Females
Usually read every page	62%	61%	63%
Read certain pages or sections	38	39	37
Business, finance	76	77	74
Classified	76	75	76
Comics	76	75	78
Editorial page	78	76	79
Entertainment	80	76	84
Food, cooking	78	70	84
General news	92	91	93
Home furnishings, improvement	74	69	78
Sports	79	86	72
TV, radio listings	75	73	77
Projected base: Average Weekday Audience (in 000's)	(109,190)	(52,459)	(56,731)

Source: 1984 SMRB SMM

Table 2

Types of Daily Newspaper Pages or Sections Usually Read
(Adults, by Age)

	Percent of Weekday Audience					
	18-24	25-34	35-44	45-54	55-64	65+
Usually read every page	50%	61%	64%	64%	67%	69%
Read certain pages or sections	50	39	36	36	33	31
Business, finance	63	74	78	79	80	80
Classified	71	75	77	76	77	78
Comics	75	75	75	76	79	80
Editorial page	65	75	78	80	83	85
Entertainment	78	80	80	86	82	82
Food, cooking	67	75	78	79	83	85
General news	86	91	93	93	94	96
Home furnishings, improvement	61	73	75	76	77	80
Sports	75	78	80	80	80	81
TV, radio listings	68	74	75	75	79	81
Projected base: Average Weekday Audience (in 000's)	(16,572)	(23,473)	(19,826)	(16,210)	(16,250)	(16,858)

Source: 1984 SMRB SMM

Table 3

Types of Daily Newspaper Pages or Sections Usually Read
(Males, by Age)

	Percent of Weekday Audience					
	18-24	25-35	35-44	45-54	55-64	65+
Usually read every page	48%	59%	63%	63%	67%	69%
Read certain pages or sections	52	41	37	37	32	31
Business, finance	63	75	80	80	83	83
Classified	68	75	76	76	77	79
Comics	70	74	74	74	79	79
Editorial page	63	73	77	79	82	84
Entertainment	75	75	76	76	78	79
Food, cooking	60	67	70	73	76	77
General news	86	89	93	93	93	95
Home furnishings, improvement	57	67	71	72	75	76
Sports	86	86	87	86	86	87
TV, radio listings	65	72	73	72	77	79
Projected base: Average Weekday Audience (in 000's)	(8,217)	(11,792)	(9,853)	(8,027)	(7,567)	(7,003)

Source: 1984 SMRB SMM

Table 4

Types of Daily Newspaper Pages or Sections Usually Read
(Females, by Age)

	Percent of Weeday Audience					
	18-24	25-34	35-44	45-54	55-64	65+
Usually read every page	52%	62%	64%	65%	66%	70%
Read certain pages or sections	48	38	36	35	34	30
Business, finance	63	74	75	78	78	79
Classified	74	76	78	77	77	77
Comics	78	77	75	77	79	80
Editorial page	68	77	80	80	84	85
Entertainment	81	85	85	83	85	84
Food, cooking	74	83	86	85	89	90
General news	87	93	93	94	95	96
Home furnishings, improvement	65	78	80	80	81	83
Sports	64	71	72	74	74	76
TV, radio listings	72	76	77	77	80	82
Projected base: Average Weekday Audience (in 000's)	(8,354)	(11,681)	(9,973)	(8,183)	(8,683)	(9,855)

Source: 1984 SMRB SMM

Table 5

Types of Daily Newspaper Pages or Sections Usually Read
(Adults, by Education)

	Percent of Weekday Audience			
	College Graduate	1-3 yrs. College	High School Graduate	Some High School or Less
Usually read every page	62%	59%	64%	62%
Read certain pages or sections	38	41	36	38
Business, finance	81	75	75	71
Classified	75	75	77	75
Comics	75	75	78	77
Editorial page	81	76	78	76
Entertainment	82	80	81	77
Food, cooking	77	74	80	77
General news	94	92	92	90
Home furnishings, improvement	74	71	76	73
Sports	80	78	79	78
TV, radio listings	75	73	77	76
Projected base: Average Weekday Audience (in 000's)	(21,486)	(20,477)	(43,905)	(23,322)

Source: 1984 SMRB SMM

Table 6

Types of Daily Newspaper Pages or Sections Usually Read
(Males, by Education)

	Percent of Weekday Audience			
	College Graduate	1-3 yrs. College	High School Graduate	Some High School or Less
Usually read every page	62	57	64	59
Read certain pages or sections	38	43	36	41
Business, finance	84	76	78	69
Classified	74	73	78	73
Comics	74	73	77	76
Editorial page	80	71	77	73
Entertainment	78	76	78	73
Food, cooking	72	64	73	69
General news	93	92	91	88
Home furnishings, improvement	71	64	72	68
Sports	86	87	88	84
TV, radio listings	72	70	75	73
Projected base: Average Weekday Audience (in 000's)	(12,350)	(9,812)	(19,283)	(11,014)

Source: 1984 SMRB SMM

Table 7

Types of Daily Newspaper Pages or Sections Usually Read
(Females, by Education)

	Percent of Weekday Audience			
	College Graduate	1-3 yrs. College	High School Graduate	Some High School or Less
Usually read every page	63%	61%	63%	65%
Read certain pages or sections	37	39	37	35
Business, finance	77	75	73	74
Classified	75	77	77	77
Comics	77	78	78	79
Editorial page	83	79	78	78
Entertainment	87	84	84	80
Food, cooking	84	83	86	83
General news	96	93	93	92
Home furnishings, improvement	79	77	93	77
Sports	72	70	79	73
TV, radio listings	71	76	78	78
Projected base: Average Weekday Audience (in 000's)	(9,135)	(10,665)	(24,622)	(12,308)

Source: 1984 SMRB SMM

Table 8

Types of Daily Newspaper Pages or Sections Usually Read
(Adults, by Household Income)

	Percent of Weekday Audience				
	$35,000 & over	$25,000-34,999	$15,000-24,999	$10,000-14,999	Under $10,000
Usually read every page	59%	63%	66%	63%	63%
Read certain pages or sections	41	37	34	37	37
Business, finance	78	75	75	73	74
Classified	74	76	77	76	77
Comics	73	77	79	78	79
Editorial page	76	77	79	78	78
Entertainment	79	81	82	81	79
Food, cooking	75	78	79	79	79
General news	93	92	92	92	92
Home furnishings, improvement	71	75	76	76	76
Sprots	78	80	80	79	78
TV, radio listings	71	75	79	77	77
Projected base: Average Weekday Audience (in 000's)	(33,141)	(22,793)	(23,919)	(14,284)	(15,053)

Source: 1984 SMRB SMM

Table 9

Types of Daily Newspaper Pages or Sections Usually Read
(Males, by Household Income)

	Percent of Weekday Audience				
	$35,000 & over	$25,000-34,999	$15,000-24,999	$10,000-14,999	Under $10,000
Usually read every page	59%	64%	63%	59%	64%
Read certain pages or sections	41	36	37	41	36
Business, finance	80	78	75	71	74
Classified	73	77	76	73	78
Comics	71	77	78	75	78
Editorial page	74	77	77	75	76
Entertainment	76	77	77	75	75
Food, cooking	67	72	72	70	72
General news	92	92	91	91	90
Home furnishings, improvement	66	71	71	70	90
Sports	86	88	86	84	87
TV, radio listings	70	73	76	74	75
Projected base: Average Weekday Audience (in 000's)	(17,572)	(11,996)	(11,129)	(6,478)	(5,284)

Source: 1984 SMRB SMM

Table 10

Types of Daily Newspaper Pages or Sections Usually Read
(Females, by Household Income)

	Percent of Weekday Audience				
	$35,000 & over	$25,000-34,999	$15,000-24,999	$10,000 14,999	Under $10,000
Usually read every page	60%	62%	67%	67%	63%
Read certain pages or sections	40	38	33	33	37
Business, finance	69	72	75	75	73
Classified	74	75	79	79	77
Comics	75	78	80	81	79
Editorial page	78	78	81	81	79
Entertainment	83	84	85	86	81
Food, cooking	84	84	86	86	83
General news	94	93	93	93	93
Home furnishings, improvement	76	79	80	80	78
Sports	69	71	74	74	73
TV, radio listings	74	76	80	82	79
Projected base: Average Weekday Audience (in 000's)	(15,570)	(10,797)	(12,789)	(7,806)	(9,769)

Source: 1984 SMRB SMM

Table 11

Types of Daily Newspaper Pages or Sections Usually Read
(Adults, by Employment Status)

	Percent of Weekday Audience			
	Total Employed	Full Time	Part Time	Not Employed
Usually read every page	61%	61%	60%	64%
Read certain pages or sections	39	39	40	36
Business, finance	76	77	72	75
Classified	75	75	74	77
Comics	75	75	74	79
Editorial page	76	77	75	79
Entertainment	79	79	79	82
Food, cooking	75	75	74	82
General news	92	92	91	93
Home furnishings, improvement	72	72	71	77
Sports	80	80	75	78
TV, radio listings	74	74	73	78
Projected base: Average Weekday Audience (in 000's)	(67,737)	(59,263)	(8,473)	(41,453)

Source: 1984 SMRB SMM

Table 12

Types of Daily Newspaper Pages or Sections Usually Read
(Males, by Employment Status)

	Percent of Weekday Audience	
	Employed+	Not Employed
Usually read every page	61%	62%
Read certain pages or sections	39	38
Business, finance	77	76
Classified	74	76
Comics	74	77
Editorial page	75	77
Entertainment	76	78
Food, cooking	69	72
General news	91	92
Home furnishings, improvement	69	70
Sports	87	85
TV, radio listings	72	75
Projected base: Average Weekday Audience (in 000's)	(38,123)	(14,336)

Source: 1984 SMRB SMM

+ "Full time" and "part time" breaks excluded because of small base for part-time workers.

Table 13

Types of Daily Newspaper Pages or Sections Usually Read
(Females, by Employment Status)

	Percent of Weekday Audience			
	Total Employed	Full Time	Part Time	Not Employed
Usually read every page	62%	61%	63%	65%
Read certain pages or sections	38	39	37	35
Business, finance	74	74	73	75
Classified	76	77	75	77
Comics	76	77	76	80
Editorial page	78	78	78	80
Entertainment	83	84	82	84
Food, cooking	83	83	87	87
General news	93	93	92	93
Home furnishings, improvement	76	76	77	81
Sports	70	70	71	74
TV, radio listings	76	76	76	79
Projected base: Average Weekday Audience (in 000's)	(29,613)	(23,730)	(5,884)	(27,117)

Source: 1984 SMRB SMM

Table 14

Types of Daily Newspaper Pages or Sections Usually Read
(Adults, by Occupation)

	Percent of Weekday Audience			
	Professional, Manager	Clerical, Sales*	Precision, Craft	Other Employed
Usually read every page	63%	60%	60%	61%
Read certain pages or sections	37	40	40	39
Business, finance	81	75	73	72
Classified	75	75	75	76
Comics	75	74	74	76
Editorial page	81	76	73	73
Entertainment	81	81	73	77
Food, cooking	77	77	68	73
General news	93	92	91	90
Home furnishings, improvement	74	73	69	70
Sports	80	76	85	80
TV, radio listings	74	74	71	75
Projected base: Average Weekday Audience (in 000's)	(19,591)	(21,659)	(7,954)	(18,534)

Source: 1984 SMRB SMM

*Includes technicians previously classified with "professional, manager" group.

Table 15

Types of Daily Newspaper Pages or Sections Usually Read
(Males, by Occupation)

	Percent of Weekday Audience			
	Professional, Manager	Clerical, Sales*	Precision, Craft	Other Employed
Usually read every page	63%	58%	60%	61%
Read certain pages or sections	37	42	40	39
Business, finance	84	78	74	72
Classified	74	73	76	75
Comics	74	71	74	76
Editorial page	80	74	74	72
Entertainment	78	76	73	75
Food, cooking	72	67	67	69
General news	92	91	91	90
Home furnishings, improvement	71	66	68	69
Sprots	86	86	88	87
TV, radio listings	72	71	71	73
Projected base: Average Weekday Audience (in 000's)	(11,454)	(8,217)	(7,245)	(11,207)

Source: 1984 SMRB SMM

*Includes technicians previously classified with "professional, manager" group.

Table 16

Types of Daily Newspaper Pages or Sections Usually Read
(Females, by Occupation)

	Percent of Weekday Audience		
	Professional, Manager	Clerical, Sales*	Other Employed+
Usually read every page	63%	61%	61%
Read certain pages or sections	37	39	39
Business, finance	77	74	72
Classified	76	76	77
Comics	77	76	76
Editorial page	82	78	73
Entertainment	86	81	80
Food, cooking	85	83	79
General news	95	93	90
Home furnishings, improvement	79	77	72
Sprots	72	70	68
TV, radio listings	77	75	75
Projected base: Average Weekday Audience (in 000's)	(8,136)	(13,442)	(8,035)

Source: 1984 SMRB SMM

*Includes technicians previously classified with "professional, manager" group.

+Includes "craftsman, foreman" (base too small to show separately)

Table 17

Types of Daily Newspaper Pages or Sections Usually Read
(Adults, by Marital Status)

	Single	Married	Widowed, Divorced, Separated
Usually read every page	53%	65%	64%
Read certain pages or sections	47	35	36
Business, finance	68	78	75
Classified	70	77	78
Comics	74	77	77
Editorial page	71	79	79
Entertainment	79	81	81
Food, cooking	70	79	81
General news	88	93	94
Home furnishings, improvement	65	76	76
Sports	78	80	77
TV, radio listings	70	76	79
Projected base: Average Weekday Audience (in 000's)	(22,512)	(69,445)	(17,182)

Source: 1984 SMRB SMM

Table 18

Types of Daily Newspaper Pages or Sections Usually Read
(Males, by Marital Status)

	Single	Married	Widowed, Divorced, Separated
Usually read every page	52%	64%	61%
Read certain pages or sections	48	36	39
Business, finance	69	80	74
Classified	68	77	76
Comics	72	76	74
Editorial page	68	79	73
Entertainment	76	77	74
Food, cooking	64	73	68
General news	88	93	91
Home furnishings, improvement	61	72	68
Sports	85	87	86
TV, radio listings	67	74	74
Projected base: Average Weekday Audience (in 000's)	(12,263)	(35,606)	(4,590)

Source: 1984 SMRB SMM

Table 19

Types of Daily Newspaper Pages or Sections Usually Read
(Females, by Marital Status)

	Single	Married	Widowed, Divorced, Separated
Usually read every page	54%	65%	66%
Read certain pages or sections	46	35	34
Business, finance	68	76	76
Classified	72	77	78
Comics	77	78	79
Editorial page	74	80	82
Entertainment	83	84	83
Food, cooking	77	86	85
General news	89	94	94
Home furnishings, improvement	69	81	79
Sports	69	72	73
TV, radio listings	73	76	80
Projected base: Average Weekday Audience (in 000's)	(10,249)	(33,889)	(12,592)

Source: 1984 SMRB SMM

Table 20

Types of Daily Newspaper Pages or Sections Usually Read
(Adults, by Number of People in Household)

	One-Two	Three-Four	Five or More
Usually read every page	65%	60%	59%
Read certain pages or sections	35	40	41
Business, finance	78	74	73
Classified	77	75	75
Comics	80	74	75
Editorial page	81	76	73
Entertainment	83	79	79
Food, cooking	81	76	75
General news	94	91	90
Home furnishings, improvement	77	72	71
Sports	80	78	78
TV, radio listings	78	73	72
Projected base: Average Weekday Audience (in 000's)	(45,898)	(44,696)	(18,597)

Source: 1984 SMRB SMM

Table 21

Types of Daily Newspaper Pages or Sections Usually Read
(Males, by Number of People in Household)

	One-Two	Three-Four	Five or More
Usually read every page	65%	59%	58%
Read certain pages or sections	35	41	42
Business, finance	79	76	75
Classified	77	74	74
Comics	78	72	73
Editorial page	80	74	72
Entertainment	79	75	75
Food, cooking	74	68	67
General news	93	90	89
Home furishings, improvement	73	67	67
Sports	87	85	87
TV, radio listings	76	71	70
Projected base: Average Weekday Audience (in 000's)	(21,106)	(22,353)	(9,000)

Source: 1984 SMRB SMM

Table 22

Types of Daily Newspaper Pages or Sections Usually Read
(Females, by Number of People in Household)

	One-Two	Three-Four	Five or More
Usually read every page	66%	61%	61%
Read certain pages or sections	34	39	39
Business, finance	77	73	71
Classified	77	76	76
Comics	81	76	76
Editorial page	83	78	74
Entertainment	86	83	82
Food, cooking	86	84	82
General news	94	92	91
Home furnishings, improvement	81	77	75
Sports	75	70	69
TV, radio listings	80	76	74
Projected base: Average Weekday Audience (in 000's)	(24,791)	(22,343)	(9,597)

Source: 1984 SMRB SMM

Table 23

Types of Daily Newspaper Pages or Sections Usually Read
(Adults, by Locality Type)

	Percent of Weekday Audience		
	Central City	Metro-Suburban	Non-Metropolitan
Usually read every page*	57%	63%	68%
Read certain pages or sections	43	37	32
Business, finance	70	76	82
Classified	71	76	83
Comics	77	75	78
Editorial page	77	77	80
Entertainment	80	80	81
Food, cooking	76	77	80
General news	92	92	93
Home furnishings, improvement	73	74	76
Sports	79	79	78
TV, radio listings	76	75	76
Projected base: Average Weekday Audience (in 000's)	(34,180)	(52,360)	(22,649)

Source: 1984 SMRB SMM

*See final paragraph of "Introductory Note."

Table 24

Types of Daily Newspaper Pages or Sections Usually Read
(Males, by Locality Type)

	Percent of Weekday Audience		
	Central City	Metro-Suburban	Non-Metropolitan
Usually read every page*	55%	62%	67%
Read certain pages or sections	45	38	33
Business, finance	71	78	82
Classified	69	76	82
Comics	75	74	77
Editorial page	75	75	79
Entertainment	76	76	78
Food, cooking	68	69	76
General news	91	92	91
Home furnishings, improvement	67	69	73
Sports	88	87	83
TV, radio listings	73	72	74
Projected base: Average Weekday Audience (in 000's)	(16,093)	(25,695)	(10,672)

Source: 1984 SMRB SMM

*See final paragraph of "Introductory Note."

Table 25

Types of Daily Newspaper Pages or Sections Usually Read
(Females, by Locality Type)

	Percent of Weekday Audience		
	Central City	Metro-Suburban	Non-Metropolitan
Usually read every page*	59%	63%	69%
Read certain pages or sections	41	37	31
Business, finance	70	74	82
Classified	73	76	83
Comics	78	77	80
Editorial page	79	78	82
Entertainment	84	84	84
Food, cooking	84	85	85
General news	93	93	94
Home furishings, improvement	77	78	80
Sports	72	71	74
TV, radio listings	78	77	77
Projected base: Average Weekday Audience (in 000's)	(18,087)	(26,665)	(11,977)

Source: 1984 SMRB SMM

*See final paragraph of "Introductory Note."

Research Report

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Newspaper Advertising Bureau, Inc. 1180 Avenue of the Americas, New York, New York 10036

AUTOMOTIVE AFTERMARKET 1984:

A STUDY OF PRIMARY CAR MAINTAINERS

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New York, N.Y. 10036

December 1984

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc. as a service to the newspaper industry and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

The study design and report were the responsibility of Albert E. Gollin and Michele Nassberg of NAB's Research Department.

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INTRODUCTION

The Automobile Industry--Dimensions and Trends

The automobile industry is doing well these days, which is good news for the American economy. The industry has cut production costs and improved plant efficiency. Production in 1984 grew substantially: for the first eleven months, U.S. car production soared to 7.3 million units, up from 6.3 million units for the same period in 1983. It has been the best year since 1979, when 8.4 million cars were built in the U.S. (Table 1).

Table 1: U.S. Domestic Car Production

	Jan. 1-Dec. 3 1983		Jan. 1-Dec.1 1984	
	units	% total	units	% total
General Motors	3,710,214	59%	4,088,046	56%
Ford	1,436,639	23	1,661,596	23
Chrysler	824,134	13	1,165,033	16
American Motors	183,576	3	177,264	2
Volkswagen	90,008	1	69,236	1
Honda	48,420	1	127,673	2
Total U.S. cars	6,292,991	100%	7,288,848	100%

Source: Automotive News, Dec. 1984

Sales Trends

The six major U.S. automakers sold 7.9 million new passenger cars in the 1984 model year (which ended Sept. 30), up 22.4 percent from 6.5 million sold in 1983. Domestic and foreign automakers sold about 10.3 million cars overall in the 1984 model year, 17 percent over the 8.8 million a year earlier and the best since 1979. Foreign car makers sold a record number of cars--2.4 million. But foreign share of the U.S. auto market was only 23 percent, compared with 1983's 27 percent. This year has been the lowest for foreign cars in five years, due to import restrictions and sales growth by U.S. companies.

The 1985 model year sales of domestic and imported cars are expected to reach around 10.5 million. Uncertainty persists because of the threat of increases in interest rates (which depress "big ticket" item purchases), slower economic growth, and slower growth in disposable personal income.

Expenditure Trends

Consumers paid $65 billion for new cars in 1983 and $25.7 billion for used cars. In addition, $91 billion was spent on fuel, slightly less than the previous year. (Table 2). Prices paid for new cars averaged $10,530 in 1983, up 53% from the $6,861 average in 1979.

Table 2: Personal Consumption Expenditures (in billions)

	1978	1980	1982	1983
New autos	$48.2	$46.3	$52.9	$65.1
Used autos	14.9	15.5	21.0	25.7
Tires, tubes, and accessories and parts	14.7	18.9	21.6	23.5
Repair, greasing, washing, parking, storage, and rental	28.1	32.3	37.5	38.4
Gasoline and oil	51.2	84.8	91.5	90.8

Sources: U.S. Bureau of Economic Analysis and Survey of Current Business.

Cars and Drivers

Currently about 162 million motor vehicles are registered in the United States: 125 million passenger cars, and 37 million trucks and buses. The average car on the road is 7.2 years old, nearly a year older than in 1979, and older than at any time since 1950. To keep car costs in line with income, people are holding onto cars longer. Higher car prices are not the only problem drivers face. Increases in interest, insurance, licensing, maintenance, repair, and fuel costs are additional factors encouraging people to hold onto older cars. The average car travelled 9,167 miles, averaging 16.3 miles per gallon.

Families today own fewer cars than before. According to Data Resources Inc., multiple-car family ownership has declined from the record 1978 average of 1.22 cars per family to 1983's 1.17, the lowest reading in twelve years.

More than 152 million people are licensed to drive motor vehicles in the U.S. Men account for 79.5 million or 52 percent of licensed drivers. Women comprise 48% of licensed drivers, 30% of registered owners of domestic cars, and 43% of domestic car principal drivers.

The Automotive Aftermarket

In 1983, the auto service and parts market accounted for just over $83 billion. Approximately $28 billion was spent on service labor, $40 billion on parts and accessories, and $15 billion on tires. Shown below is a breakdown of aftermarket sales by outlet (Table 3).

New car dealerships' disproportionately large share (30%) of the automotive service and parts business reflects their dominant role when it comes to more difficult, expensive repair work, as well as their larger facilities.

Table 3: Auto Repair Facilities Market (1983)

Outlet	Total service and parts market (billions)	% of market	Number of facilities	% of repair facilities
Franchised new car dealerships	$25.1	30%	24,725	8%
Auto repair shops (independent & franchised)	23.1	28	180,000	60
Tire, battery and accessory dealers	17.6	21	20,000	7
Gasoline service stations *	7.8	9	70,000	23
Mass merchandisers	7.6	9	2,800	1
All other service outlets	2.0	3	1,500	1
TOTAL	$83.2	100%	299,025	100%

*Includes only those outlets that perform significant repair work (i.e., that perform work beyond simple oil changes or lube jobs that receive at least 2% of total dollar revenue from service work.)

Sources: NADA Industry Analysis Department and U.S. Bureau of Census

The number of auto parts stores in the United States increased by an impressive 33 percent since 1980, to 38,000. In contrast, the number of tire stores, service stations, and new car dealers selling auto products has decreased, as shown below in table 4.

In total, APAA reported 518,700 U.S. retail outlets in 1983, 30 percent of which sold auto parts. Specialty repair shops (such as tune-up and quick lube centers) and drug stores or independent garages selling car parts and products showed the greatest growth in 1983. Consumer demand for specialized assistance with their cars has created a stronger position for these outlets in the automotive aftermarket.

Table 4: Number of Outlets Selling Auto Products

Store type	1980	1983	% change
Auto repair and service outlets other than service stations	137,800	156,400	+17
Service stations	150,100	130,100	-13
Grocery stores	83,600	85,100	+2
Auto parts stores	28,600	38,000	+33
New car dealers	29,800	26,700	-10
Hardware stores	17,800	18,200	+2
Drug stores	13,400	15,000	+12
Tire stores	14,800	12,200	-18
Discount stores	6,900	7,000	+1
Variety stores	5,900	5,300	-10
Department stores	2,700	2,500	-7

Source: Automotive Parts and Accessories Association (1984)

Gasoline Stations

Since 1980, the number of gas stations has declined 13.3% (Ad Age, June 21, 1984). With the advent of self-service, fewer gas stations actually service automobiles or even sell parts. Self-service now accounts for 72% of all gasoline sales compared with 5% in 1972.

Advertising

The automotive industry spent a total of $433.4 million in 1983 for national advertising in newspapers, an increase of 7.3% over the prior year. Ads for passenger cars take the largest share of newspaper advertising, accounting for $326.3 million of the total investment.

Table 5: 1983 National Advertising Investments in Newspapers

AUTOMOTIVE	1983	1982	% change
Gasoline & oil companies	$ 18,770,000	$ 22,975,000	-18.3
Leasing & rentals	50,115,000	36,601,000	+36.9
Parts, accessories & supplies	13,326,000	11,303,000	+17.9
Passenger cars (new)	326,332,000	312,279,000	+4.5
Trucks, trailers & mobile homes	22,730,000	19,561,000	+16.2
Automotive not elsewhere classified	2,088,000	1,250,000	+67.0
AUTOMOTIVE TOTAL	$433,361,000	$403,969,000	+7.3

Source: Media Records

This substantial investment makes the automotive aftermarket industry a key customer for newspapers. To help them reach the customers for their products and use newspapers more effectively as a medium for their advertising, NAB has sponsored this survey of primary car maintainers.

Survey of Primary Car Maintainers

Early in 1984, The Gallup Organization was commissioned to conduct a telephone survey with a nationally representative sample of primary car maintainers in 1,202 car-owning households.[1] Eligibility was determined by asking to interview "the person who usually decides when and where your car is repaired or serviced." Interviewing was further restricted to adults between the ages of 18-64. Thus, this is a nationally representative sample of self-acknowledged, "primary car maintainers" of one or more cars in car-owning households, rather than the more conventional national sample of adults 18 years of age and older.[1]

---

[1] Field work was conducted between Jan. 24 - Feb. 4, 1984. Weighting of the data by region was employed. The numbers of weighted and unweighted respondents in various demographic groups are shown in Appendix table D.

These criteria of eligibility were adopted after consultation with representatives of dealers and manufacturers of automotive aftermarket products, in order to gain a clearer picture of key decision-makers among their customers: those whose attitudes and actions largely define the mass market. Questions used in an NAB survey in 1974 were augmented by others developed in response to changing market conditions, in order to develop timely information on the perceptions and behavior of prime prospects for auto aftermarket products.[2]

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[1] A technical report by The Gallup Organization that contains sampling and data processing information is available from NAB's Research Department.

[2] A copy of the survey questionnaire is included in the Appendix to this report. Further details on the survey's findings are available from NAB's Detroit office or the Research Department in New York City.

PRIMARY CAR MAINTAINERS AND CAR CARE

The relationship of consumers to their cars is changing rapidly as American households undergo changes. More women are working and people are becoming more self-reliant in buying gasoline and in caring for their car.

The proportion of women who identify themselves as usually making car repair and maintenance decisions is larger today than ever before. Two out of five (39%) people in our sample of "primary maintainers" (PMs) are women. (Table 6) The increasing number of women responsible for at least one car in the home is having an impact on the automotive aftermarket. As a result, advertising of products need no longer be primarily geared toward men, nor should it appear only in male-oriented media.

PMs are better than average newspaper readers: 71 percent read a daily paper yesterday, and 72 percent did so on the preceding Sunday, compared with an average readership of 67 percent weekdays and Sundays.

Two out of three primary maintainers do some car maintenance and repair work on their own. They will be called "do-it-yourselfers" (DIYers). About half (32 percent of all PMs) say they do minor maintenance, such as changing oil or anti-freeze, and 34 percent say they do major repairs or practically all needed maintenance work, that is, engine tune-ups or installation of parts such as spark plugs, car batteries, or mufflers. Only about one-third of the PMs do not do any repair or maintenance work by themselves, relying instead on service facilities or others in their households.

More than three out of five (62%) PMs have two or more cars in their household. Only one-quarter (26%) of primary maintainers purchased a new car within the past three model years.

Table 6: Profile of Primary Maintainers

Sex:	
Male	61%
Female	39
Age:	
18-24	11
25-34	33
35-44	23
45-54	15
55-64	17
Household income:	
under $15M	17
$15M-$24.9M	26
$25M-$34.9M	25
$35M +	32
Education:	
some college +	52
high school grad	36
less than high school grad	11
Marital status:	
married	64
divorced, separated, widowed	17
single (never married)	19
Employment:	
employed	77
not employed	23
Occupation (selected):	
professional/managerial	12
clerical/sales	10
craftsman/foreman	14
Region:	
East	23
Mid-West	26
South	31
West	20
City size:	
metro	30
suburbs	36
non-metro	34
Newspaper readership:	
read yesterday	71
frequent reader (4-5 days)	66
infrequent reader (0-3 days)	34
Sunday reader	72
Do-it-yourself:	
do major repairs, maintenance	34
do minor repairs, maintenance	32
non do-it-yourselfer	34
Number of cars in household:	
one	38
two	40
three +	22
New car purchasers (1982-84 models):	26
Base: Total primary maintainers = 100%	(1,202)

Question: Are you the person who usually decides when and where your car is repaired or serviced?

Car Maintenance Practices and Attitudes

Almost half (48%) of the primary maintainer sample bring their cars in for regular check-ups. About one-third (35%) bring it in for servicing only when something goes wrong; the remainder do checkups themselves (Table 7). Women and older people are more likely to bring it in for servicing at regular intervals. Younger PMs are somewhat likelier to service their car only when something is wrong. People with less education or lower income also tend to wait till a repair or adjustment is needed. But non-DIYers are very concerned about keeping their car in good working condition: seven out of ten bring their car for regular check-ups. Similarly, those who recently purchased a new car that may still be under warranty or service protection plans tend to service their cars regularly more often than the average PM.

No one type of service outlet dominates the market: New car dealers and garage/repair shops are each mentioned by about one-third of those whose cars are serviced by someone. Only one out of five PMs say that they usually bring their car to a gas station. In a 1974 auto aftermarket study conducted by the Newspaper Advertising Bureau solely with male car owners, one-third of the men reported using gasoline stations as their usual service place. Now only one man in five uses them. The past dozen years have seen a sharp drop in the number of gasoline service stations, especially those that are independently owned. As a result, more car owners have had to find other means of getting their car serviced or learned to repair their own cars.

Those who are more upscale (i.e. higher education, income, and occupation) patronize car dealers more. New car owners are especially prone to use a new car dealer for servicing, often because their car remains under

Table 7: Regularity of Car Maintenance

	Regular Intervals	Only when something is wrong	Do check-ups myself
Total PM sample:	48%	35%	17%
Sex:			
Male	41%	35%	24%
Female	59	34	7
Age:			
18-24	38	46	16
25-34	40	37	23
35-44	49	34	17
45-54	58	28	14
55-64	57	31	12
Household income:			
under $15M	35	47	18
$15M-$24.9M	50	34	16
$25M-$34.9M	43	35	22
$35M +	55	30	15
Education:			
some college +	57	30	13
high school grad	41	38	21
less than high school grad	30	44	26
Marital status:			
married	44	36	20
divorced, separated, widowed	55	29	16
single (never married)	54	34	12
Employment:			
employed	48	34	18
not employed	46	37	17
Occupation (selected):			
professional/managerial	57	26	17
clerical/sales	59	30	11
craftsman/foreman	28	36	34
Region:			
East	54	33	13
Mid-West	45	37	18
South	45	33	22
West	51	35	14
City size:			
metro	51	35	14
suburbs	50	32	18
non-metro	42	38	20
Newspaper readership:			
read yesterday	51	33	16
frequent reader (4-5 days)	53	32	15
infrequent reader (0-3 days)	38	40	22
Sunday reader	52	33	15
Do-it-yourself:			
do major repairs, maintenance	19	35	46
do minor repairs, maintenance	53	43	3
non do-it-yourselfer	71	26	3
Number of cars in household:			
one	53	34	13
two	46	36	18
three +	43	33	24
New car purchasers (1982-84 models):	62	27	11

Question: Do you take your car in for check-ups or routine maintenance at regular intervals or only when you think something is wrong?

warranty or because of the confidence built through satisfactory warranteed work in the past.

Reasons for Choosing a Service Outlet

Better service and a generally good reputation are the two main reasons given for taking one's car to a usual place of service. Confidence in the staff's quality is another important reason, cited by one-quarter of the PMs (Table 8).

Table 8: Reasons for Having Car Serviced at a Particular Place*

Better service	34%
Good reputation	32
Like/know personnel	26
Less expensive	14
Good location	14
Other (car still under warranty, will guarantee work, better value, and other)	25

Base: Those who have their car serviced (N)= (995)

Question: Why do you take your car to be serviced at this particular place?

* Adds to more than 100% due to multiple mentions. "Don't knows" (5%) were excluded.

Of the PMs who take their cars to a commercial outlet for service, 70 percent take it to the same place every time. There is little variation in this percentage among different PM demographic segments, e.g., men and women (Table 9).

Table 9: Take Car to Same Place for Service vs. Sometimes Go to Another Place

	Total	Male	Female
Always same place	70%	68%	73%
Sometimes another place	26	27	25
Don't know	4	5	2

Base: Those who have their car serviced (N)= (995)

Question: Do you take your car to be serviced to the same place every time, or do you sometimes go to another place?

Garage/repair shops are mentioned as the "other" service facility by two out of five (39%) of those who sometimes go elsewhere, with gas stations (23%) and new car dealerships (19%) following in order of importance as alternative outlets. It is the promise of better service, convenience of location, or cost savings that motivates those who shop around.

Gasoline Purchasing

Primary maintainers fall into two nearly equal groups: those who are "station-loyal," buying gasoline only at one specific station (48%), and those who shop around among several stations (52%). Women are slightly more inclined to stick to one gas station, as are non do-it-yourselfers.

The average gasoline station of today is not a full-service station as it was in the past. Self-service now accounts for 72 percent of all gasoline sales, compared with 5 percent in 1972. In our survey, 69 percent of the primary maintainers actually prefer self-service to attendant service. This is especially true of men, young people, westerners, and those who buy gasoline at several stations (Table 10).

Table 10: Gas Station Service Preference*

	Self service	Attendant service	Doesn't matter
Total PM sample:	69%	25%	6%
Sex:			
Male	77%	16%	7%
Female	56	40	4
Age:			
18-24	76	18	6
25-34	74	22	4
35-44	66	25	9
45-54	67	30	3
55-64	63	31	6
Region:			
East	50	41	9
Mid-West	72	23	5
South	74	19	7
West	80	18	2
Do-it-yourself:			
do major repairs, maintenance	84	11	5
do minor repairs, maintenance	71	21	8
non do-it-yourselfer	51	44	5
Number of cars in household:			
one	60	34	6
two	71	23	6
three +	81	15	4
New car purchasers (1982-84 models):	72	23	5

* "Don't knows" and "No self service in the area" (2%) were excluded.

Question: Do you prefer to fill the car yourself at a "self-serve" facility, or do you prefer to have it filled by an attendant?

Not surprisingly, those who choose to do their own car repair and maintenance work generally prefer to pump their own gasoline: five out of six major DIYers opt for self-service vs. only one-half of the non-DIYers.

As self-service gas typically costs a few pennies less, those with more cars (and thus more expenses) look for the savings. Eight out of ten (81%) PMs who own three or more cars prefer to pump gas themselves.

AUTOMOTIVE PARTS BUYING

The automotive aftermarket is large not only in its dollar volume but also in the range of its products. This survey dealt with seven of them. Nearly all male PMs in this survey personally bought or replaced motor oil and oil filters within the past year. Seven out of ten bought spark plugs; nearly three out of five bought tires; two out of five replaced a battery, one out of four a muffler, and one in five a shock absorber. These figures are somewhat higher than the percentages for all male adults in the nation (as measured in various omnibus marketing surveys, e.g. SMRB), primarily because our sample is tilted toward the more active segment of aftermarket parts buyers (Table 11).

Table 11: Purchase of Seven Products in the Past Year
(based on total and selected primary maintainers)

					No. of cars in household	
	Total PMs	Male	Female	Major DIYers	Two or more cars	One car
Motor oil	95%	96%	94%	97%	96%	95%
Oil filter	89	92	84	96	91	84
Spark plugs	65	69	57	79	67	58
Tires	54	57	48	60	56	47
Car battery	37	40	33	42	39	34
Muffler	22	24	18	28	23	21
Shock absorber	18	21	13	23	19	16

Base: All PMs (for each product) under each heading.

Women PMs do not fall far behind when it comes to parts purchasing, especially the more often-replaced products such as motor oil and oil filters. Other demographic differences have only minor effects on the frequency of purchasing these products. But the amount of car work PMs do themselves has a significant impact on aftermarket parts purchasing. As expected, major do-it-yourselfers purchase all of these seven products more often than others, particularly the non-DIYers.

Not surprisingly, the more cars one owns, the wider the range of aftermarket products that are bought. Motor oil is an exception--almost all PMs, regardless of the number of cars owned, bought motor oil in the past year. New car purchasers, with less need to repair or replace automotive parts, are less likely than the average PM to buy parts: one-third less likely to buy tires, one-fifth less likely to buy spark plugs, and three-eighths less likely to buy batteries.[1]

Place of Purchase

Except for tires, bought by 53% at a tire company outlet, aftermarket products are bought at many places. No one type of outlet controls over half the market share for any other individual product. Among these sampled primary maintainers, department stores lead in selling motor oil and batteries; auto supply stores loom largest in the purchase of oil filters, spark plugs, mufflers, and shock absorbers. (Table 12).

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[1] The purchasing patterns for all seven aftermarket products by various demographic groups are shown in Appendix table A.

Table 12: Type of Outlet Where Each Part Is Most Likely to Be Purchased

Replacement part	Outlet		Base
Motor oil	Department store	30%	(1142)
	Auto supply store	28%	
Oil filter	Auto supply store	36%	(1068)
Spark plug	Auto supply store	49%	(774)
Tires	Tire company outlet	53%	(641)
Car battery	Department store	36%	(441)
Muffler	Auto supply store	34%	(273)
Shock absorber	Auto supply store	39%	(217)

Base: Number of PMs purchasing each part.

Installation of Purchased Parts

Three of the seven aftermarket products bought most recently were installed by one-half or more of the PM purchasers themselves. Motor oil, the easiest product to install, was added by 56%; oil filters and spark plugs were self-installed by approximately half of them, and batteries by about two-fifths (43%) (Table 13). Other products requiring special tools or facilities are more likely to be installed at the place of purchase. Almost one-half of the PMs (46%) who bought shock absorbers had them installed on the premises; more than one-half had mufflers installed (55%); and almost two-thirds (65%) of tire purchasers had the tires mounted where they were purchased. Women were significantly more likely to have parts installed by others, either at the place of purchase or by someone in their household.

Table 13: Who Installed the Parts?

	(N)	By self	Installed where purchased	Other household member or someone else
Motor oil				
Total	(1142)	56%	27%	17%
Men		74	19	7
Women		28	38	34
Oil filter				
Total	(1068)	51%	32%	17%
Men		68	25	7
Women		19	46	35
Spark plug				
Total	(774)	50%	31%	19%
Men		66	26	8
Women		18	42	40
Battery				
Total	(441)	43%	40%	17%
Men		60	33	7
Women		10	53	37
Shock absorber				
Total	(217)	37%	46%	17%
Men		49	38	13
Women		8	63	29
Muffler				
Total	(273)	28%	55%	17%
Men		34	51	15
Women		16	64	20
Tires				
Total	(641)	18%	65%	17%
Men		25	62	13
Women		6	73	21

Bases: All PMs who purchased each part.

Those who install automotive parts themselves are typically younger men, less educated, and in blue collar occupations. The more cars they own, the more likely they are to do the work themselves. Do-it-yourselfers are, as expected, the most likely of all PMs to install the parts they bought.[1]

Specifying Brands

When purchasing parts for their cars, a substantial proportion of primary maintainers also specify the brand they want. This varies with the types of replacement part. Motor oil brands were specified by three out of five (59%) PMs. Brands of spark plugs and tires were specified by approximately one-half of the PMs, and batteries by slightly less than half (46%). Other replacement parts purchases seem to be less brand-sensitive: only about two out of five PMs specified brands of shock absorbers and oil filters, and less than one-third bought mufflers by name. And although women form a growing segment of the automotive market, they still fall consistently behind men when it comes to specifying replacement parts by brand name. (Table 14).[2]

Seeking Information on Aftermarket Products

As we have seen, car maintainers are taking on a more active role at every stage in the repair and maintenance of their cars. But the job is becoming more difficult for them as consumers, due to the growing complexity and expense involved in car care. As a result, they place a high priority on the role of information in making decisions about car repair and servicing.

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[1] Additional details on self-installers are provided in Appendix table B.

[2] Additional details on brand-specifying by various demographic groups are shown in Appendix table C. In most cases, individual brands were identified by too few respondents to warrant more detailed analysis.

Table 14: Brand Specified When Purchasing Part

	Specified brand	(N)
Motor oil: Total	59%	(1142)
Men	66	
Women	47	
Spark plug: Total	52%	(774)
Men	62	
Women	33	
Tires: Total	50%	(641)
Men	54	
Women	42	
Battery: Total	46%	(441)
Men	50	
Women	40	
Shock absorber: Total	42%	(217)
Men	46	
Women	31	
Oil filter: Total	41%	(1068)
Men	50	
Women	26	
Muffler: Total	30%	(273)
Men	31	
Women	25	

Bases: PMs who purchased each part.

What are their prime sources of information on the aftermarket products they may ultimately buy? The PMs in our sample were asked about tires and other replacement parts in parallel questions. By combining their answers, the role of newspapers as one source among others becomes more sharply defined.

First, among all information sources on replacement parts (other than tires), newspapers emerge as the one identified most often. Almost three PMs in ten (29%) mentioned the newspaper as a source for information on values and prices (Table 15). No other mass medium accounted for as much as

Table 15: Source of Information About Replacement Parts (Other Than Tires)[a]
(based on those who identified a source)

	Newspaper	Personal contacts[b]	Dealer	Consumer reports/ consumers union	Other[c]
Total:	29%	24%	23%	11%	25%
Sex:					
Male	32%	20%	22%	10%	26%
Female	23	30	24	12	23
Age:					
18-24	26	19	31	7	30
25-34	28	21	24	12	29
35-44	31	25	19	11	24
45-54	28	23	26	13	25
55-64	29	34	17	8	16
Household income:					
under $15M	24	29	30	7	24
$15M-$24.9M	26	26	24	10	24
$25M-$34.9M	30	22	19	15	25
$35M +	33	21	24	12	26
Occupation (selected):					
professional/managerial	26	20	28	15	19
clerical/sales	32	27	23	9	24
craftsman/foreman	33	24	27	7	25
Region:					
East	34	26	20	14	23
Mid-West	34	20	17	13	29
South	24	26	26	8	24
West	23	23	29	9	25
Do-it-yourself:					
do major repairs, maintenance	36	16	21	10	28
do minor repairs, maintenance	26	24	27	11	28
non do-it-yourselfer	23	33	22	11	18
Number of cars in household:					
one	26	30	22	12	21
two	31	20	23	10	28
three +	30	21	25	11	25

Question: If you were going to buy the other replacement parts we've talked about, such as motor oil, spark plugs, batteries, etc., and wanted to compare values and prices, where would you expect to find this information?

[a] "Don't knows" (no source given) omitted; for total primary maintainers sample they equal 20%. Multiple answers are included.

[b] "Personal contacts" include family, friends, mechanics, etc.

[c] "Other sources" includes: yellow pages (8%), shop around (8%), magazines (4%), television (1%), radio (1%), and other (3%).

5 percent of all sources mentioned. "Word-of-mouth" information (gained through personal contacts with family members, friends, or mechanics) was relied on by one-quarter, as were the recommendations of car dealers. One in nine referred to prominent consumer-oriented publications as a key source.

The leading role played by newspapers can be shown in other findings as well. For example, newspaper advertising was probed by means of a sequence of questions that define unaided and aided recall of aftermarket product ads. It turned out that three out of five (61%) of all PMs recalled newspaper advertising as a source of information they expect to be able to rely on or actually use. (Table 16). And PMs who do more work on their cars themselves show even greater reliance on newspaper advertising. Thus, the most active consumers, the DIYers, are the ones who can be reached most effectively and directly through newspapers.

Table 16: Exposure to Newspaper Replacement Parts Advertising (aided and unaided)

	Total PMs	Major DIYer	Minor DIYer	Non-DIYer
Total look at newspaper parts advertising (aided and unaided)	61%	77%	64%	44%
Use newspaper to compare parts values (unaided) [a]	31	37	32	25
Look at newspaper parts advertising (aided) [b]	30	40	32	19

Questions: a If you were going to buy tires or other replacement parts and wanted to compare values and prices, where would you expect to find this information?

b Did you look at newspaper ads before you bought any of your last replacement parts?
Do you ever look at any advertising for automotive replacement parts in your newspaper?

Two sections stood out as places readers expect to find advertising of automotive aftermarket products: sports (identified by 29%) and classified (by 22%). The general news section or other sections were mentioned by smaller proportions of car maintainers. But almost one-quarter (23%) of PMs failed to identify any section in particular, which suggests that an effective advertising strategy can be built on placements throughout the paper rather than by an exclusive concentration on any specific section (Table 17).

Table 17: Newspaper Section as a Source of Information on Replacement Parts (Other than Tires)
(based on respondents who named newspapers)

	Sports	Classified	General news Section	Other[a]	Don't know[b]
Total:	29%	22%	10%	16%	23%
Male	30	23	10	16	21
Female	26	19	12	16	27
Region:					
East	32	21	10	15	22
Mid-West	24	26	7	14	29
South	22	25	17	18	18
West	43	13	7	17	20
Number of cars in household:					
One	35	15	14	16	20
Two	28	23	11	11	27
Three +	21	29	5	24	21

[a] Includes inserts, financial, and other sections.
[b] Don't know/not sure/none in particular.

Question: In which section of the newspaper would you expect to find most advertising of replacement parts (motor oil, oil filter, spark plugs, battery, muffler, shock absorber)?

Tire Buying: A Special Case

The purchase of replacement tires is a need that every car owner confronts periodically. As the dollar costs of tires exceed those of the other six aftermarket products explored in this survey, several questions on tires were added to enable us to portray buying patterns in somewhat finer detail.

As noted earlier, over one-half (54%) of all sampled PMs had bought tires in the past twelve months. Women comprised 35 percent of all tire-purchasers, only slightly less than their proportional representation among car maintainers in the total sample. Recent buyers of new cars, understandably enough, were less likely to have bought tires, as were PMs in one-car households. By way of contrast, in households with three or more cars, two-thirds of the PMs (66%) had bought replacement tires.[1] And major do-it-yourselfers, who were more likely than other car maintainers to own used cars, were also more likely (60% vs. 50%) to have bought tires in the preceding year. In both cases, greater need led to a higher incidence of tire purchasing. But as we shall see, a perceived need is not necessarily promptly followed by the purchase of tires.

Tire company outlets accounted for more than one-half (53%) of tire purchases by PMs. Three other types of tire-selling establishments were bunched together fairly closely: major department stores (14%), auto supply stores (10%) and gas/service stations (9%). Given the dominant position that tire company outlets had over all others in prior-year sales for these car maintainers, only a few notable demographic differences were observed. For example, tire company outlets were patronized proportionately more often by:

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[1] Additional details on tire-buying incidence among various demographic groups are shown in Appendix table A.

--PMs living in the West (by 65%);

--PMs who did their own major repairs (by 58%); and

--Recent new car (1982-84 model) buyers (by 61%).

Not surprisingly, the place of purchase was most often the place of installation of replacement tires: just under two-thirds (65%) of tire-buying PMs had them installed there, with self-installation accounting for half of the remainder.[1] Women, buyers over 45, wealthier tire buyers, and non-do-it-yourselfers were all more likely to rely on one-stop tire buying and installation than the average car maintainer who bought tires in the past year (Table 18)[2].

Brand-specifying by tire purchasers actually represents only one element of a complex buying decision. As we saw earlier, tire company outlets were the most heavily patronized of all tire sales establishments. In these cases, buyers are opting for one company's product line rather than another's. Thus, brand awareness, preference, and specifying are often only distinguishable in the abstract: buyers "specify" their brand by their choice of outlet rather than at a later stage in the buying process. The same fusion of tire-outlet choice and brand-specifying occurs when buyers go to major department stores that feature their own line of tires. Asking tire buyers who shop at tire company outlets or department stores about "brand specifying" may yield answers about tire types rather than brands.

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[1] The special character of those eligible to take part in this survey--primary car maintainers under age 65--lowered the incidence of place-of-purchase installation below what it would be for all adult tire buyers.

[2] Details on other tire-buyers who installed them on their own are shown in Appendix table B.

Table 18: How Tires Were Installed[a]

	Installed where purchased	By self	By other household member or someone else
Total tire purchasers:	65%	18%	17%
Sex:			
Male	62%	25%	13%
Female	73	6	21
Age:			
18-34	49	33	18
25-44	64	19	17
45-64	74	14	12
Household income:			
under $25M	60	20	20
over $25M	70	17	13
Education:			
some college +	71	13	16
high school grad	60	23	17
less than high school grad	59	26	15
Do-it-yourself:			
do major repairs, maintenance	49	36	15
do minor repairs, maintenance	74	13	13
non do-it-yourselfer	78	2	20
New car purchasers (1982-84 models):	74	8	18

[a] All rows equal 100%; "don't knows" (1%) were excluded.

Question: Was the tire(s) installed at the place where you bought it, was it installed by yourself, by another member of your household, or by someone else?

Nevertheless, when asked directly, exactly one-half of recent tire-buying PMs said they specified a brand. Heightened brand sensitivity is more common among men, higher-income tire buyers, major do-it-yourselfers, and owners of multiple cars[1]. And, confirming our analysis of the link between the choice of a tire outlet and brand-sensitivity, only 39 percent of those buying at some place other than a tire company outlet or department store specified a brand of tire. Four brands were mentioned with some frequency: Goodyear (by 24%), Michelin and Firestone (by 15% each), and B.F. Goodrich (by 9%).

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[1] Details on brand-specifying by tire buyers are shown in Appendix table C.

The time that elapses between one's recognition of a need to buy replacement tires and the actual purchase can be substantial. When PMs who had ever bought tires were asked about this delay, 57 percent said it was less than two weeks and 21 percent said it lasted between two weeks and one month. But more than one-quarter (28%) admitted that the period stretched out beyond one month. Those under age 35 were more inclined to put off their tire purchase longer, as were those who did a lot of work on their cars themselves. But the deferring of purchases for two weeks or even longer was a common pattern among all demographic groups. This suggests that opportunities exist for replacement tire advertising that stresses promptness (with the benefit of added safety) as a theme that can evoke substantial consumer response.

Tire Information Sources: Sales Staff and the Media

In making their tire-buying decisions, consumers have a range of information sources to help them. As was true for other aftermarket products, newspapers emerged as the number one tire-shopping medium, closely followed by tire dealers and by personal contacts (family members, friends, etc.) as other key information sources (Table 19). Older PMs, women, and those with lower incomes were somewhat more likely to rely on other people rather than on newspapers or other print media. Prominent among the latter are the two main consumer-oriented magazines, which are relatively more often used (along

Table 19: Source of Information About Tires[a]
(based on all who identified a source)

	Newspaper	Tire dealer	Personal contacts[b]	Consumer reports/ consumers union	Yellow pages	Other[c]
Total sample:	28%	27%	19%	16%	9%	16%
Sex:						
Male	30%	27%	17%	15%	8%	18%
Female	24	27	24	18	10	14
Age:						
18-24	26	26	19	12	13	21
25-34	26	27	18	16	11	16
35-44	30	27	17	16	9	17
45-54	32	28	18	19	8	16
55-64	24	27	27	15	3	14
Household income:						
under $15M	25	32	27	7	8	12
$15M-$24.9M	28	27	21	13	6	14
$25M-$34.9M	30	21	19	19	11	17
$35M +	29	29	13	23	10	20
Education:						
some college +	28	24	19	22	9	16
high school grad	26	30	22	9	10	15
less than h.s. grad	36	31	14	7	4	21
Region:						
East	33	24	22	20	5	18
Mid-West	29	23	20	16	9	16
South	21	31	18	13	13	14
West	30	28	18	15	8	17
City size:						
metro	29	25	16	21	9	17
suburbs	33	24	19	17	8	16
non-metro	20	32	23	10	9	15
Do-it-yourself:						
do major repairs	31	26	16	13	8	18
do minor repairs	29	28	18	17	11	18
non do-it-yourselfer	23	26	24	19	8	12

a "Don't knows" omitted; for total primary maintainers sample they equal 13%.
b "Personal contacts" include family, friends, mechanics, etc.
c "Other sources" includes: shop around (7%), magazines (4%), television (1%), radio (1%), and other (2%).

Question: If you were going to buy tires and wanted to compare values and prices, where would you expect to find this information?

with newspapers) by better educated PMs. But a variety of sources of information on tire values and prices were pinpointed by tire buyers in every demographic group; newspapers were usually first or second in order of importance.

Another indicator of the central role newspapers can play in bringing relevant information to the attention of tire purchasers is the fact that they are better than average readers: 73 percent read a paper yesterday, compared with 69 percent of all sampled PMs and 67 percent of adults in general. This means that tire advertising "selects" customers for tires with greater than average efficiency.[1]

Tire buyers give high marks to the sales personnel at their purchase outlets, another key source of information. Two thirds (67%) rated them as "very knowledgeable," and another 25 percent as "somewhat knowledgeable." Older PMs and those with less education were likelier than others to rate sales people very highly, but satisfaction with the service they received was generally shown by tire buyers in all demographic groups. The quality of staff and service at tire dealers or other outlets can be another useful theme in newspaper advertising.

The two newspaper sections in which tire advertising and other consumer information are most often expected to be found are sports (cited by 35%) and classified (cited by 27%). The sports section was pinpointed more often by men, college-educated, and higher-income tire buyers, while classified was identified with relatively greater frequency by downscale consumers . These two are where experience has led tire buyers to expect to find informative advertising. But nearly two-fifths of those mentioning newspapers either failed to specify a section or referred to some other section, which suggests that other opportunities for effective advertising exist in the pages of the daily paper apart from the two most frequently used in the past.

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[1] For other evidence on the selective appeals of newspaper advertising to prime prospects, see "How Newspaper Ads Select Customers" (Newspaper Advertising Bureau, 1980).

DO-IT-YOURSELF: A GROWING FORCE IN THE AUTOMOTIVE AFTERMARKET

As we have seen, car-owning Americans are increasingly taking a hand in a wide range of repair and maintenance tasks. This trend toward self-sufficiency, motivated in large part by economic forces (fewer convenient service outlets, rising costs of parts and labor, etc.) and also by the wish to be less dependent on others or by pride in one's own accomplishments, has fed the growth of a "do-it-yourself (DIY) share of the aftermarket that is estimated at around $10 billion. Inflation-driven costs for new and used cars have encouraged people to hold onto cars longer. As a result, the average age of registered cars has risen over the past decade from less than four to more than seven years. Linked to this increased retention of older cars in households, therefore, is the need to find ways to minimize the costs of car care.

Profile of Do-It-Yourselfers

Our sample of primary car maintainers breaks into three segments of nearly equal size:[1]

--34 percent do some major repairs (13%) or nearly all that needs to be done, e.g. tune-ups, parts installations (21%). These are called the "major do-it-yourselfers" (DIYers) in our analysis.

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[1] The eligibility criteria used in this telephone survey (primary car maintainers, age 18-64) create a slight bias toward do-it-yourself activities. Senior citizens or other drivers in car-owning households would be less likely to take on minor or major DIY tasks. National surveys of car-owning adults generally find somewhat lower levels of hands-on involvement in car care.

--32 percent do minor servicing jobs, such as oil changes or installing anti-freeze. These are the "minor DIYers."

--34 percent admit they do little or no work on their car themselves. These are the "non-DIYers."

Some clear differences exist among PMs in these three groups, seen in terms of their demographic and car-use characteristics. For example, major DIYers are appreciably more likely to be:

- Men
- Under age 35
- Craftsmen or foremen
- Living in the Mid-West or West
- Rural (non-metro) residents

By way of contrast, the incidence of non-DIYers is greatest among women, older PMs, the formerly-married, and those employed in white collar or professional-level jobs. (Table 20).

The "need" for car care, as indicated by the number of cars in the household or usage levels, is also linked with do-it-yourself patterns. The more cars per household, the higher the proportion of DIYers. And the cars that DIYers drive are less likely to have automatic transmission, and are likelier to have higher mileage and be driven more miles annually. In all these instances, there is a positive correlation between a greater need for maintenance and the do-it-yourself proclivities of these car-owning PMs. (Table 21).

Table 20: "Do-It-Yourself" Car Care Patterns

	Major DIYers	Minor DIYers	Non-DIYers
Total PM sample:	34%	32%	34%
Sex:			
Male	47%	33%	20%
Female	13	30	57
Age:			
18-24	42	44	14
25-34	44	31	25
35-44	31	34	35
45-54	28	32	40
55-64	21	23	56
Household income:			
under $15M	39	27	34
$15M-$24.9M	33	32	35
$25M-$34.9M	38	35	27
$35M +	30	33	37
Education:			
some college +	27	34	39
high school grad	42	29	29
less than high school grad	45	31	24
Marital status:			
married	38	32	30
divorced, separated, widowed	24	23	53
single (never married)	31	39	30
Occupation (selected):			
professional/managerial	30	31	39
clerical/sales	15	32	53
craftsman/foreman	63	25	12
Region:			
East	25	36	39
Mid-West	39	31	30
South	33	31	36
West	40	31	29
City size:			
metro	29	31	40
suburbs	35	31	34
non-metro	38	34	28
Number of cars in household:			
one	25	30	45
two	37	35	28
three +	46	31	23

Question: Which of these statements best describes the amount of car maintenance and repair work you yourself do?

-- I do little or nothing to the car myself. (Non DIYer)
-- I do minor jobs like change the oil or antifreeze. (Minor DIYer)
-- I do some major jobs like engine tune-ups and repairs.]-(Major
-- I do practically everything that needs to be done. DIYer)

Table 21: PMs' Car Use Patterns: DIYers and non-DIYers

	Major DIYers	Minor DIYers	Non-DIYers	Total PMs
(N)=	(406)	(388)	(408)	(1,202)
Number of cars in household:				
one	28%	35%	51%	38%
two	43	44	34	40
three +	29	21	15	22
Transmission on car used most often:				
Automatic	63%	70%	79%	71%
Manual	37	30	21	29
Number of miles now on car:				
Avg. estimated mileage	63,300	51,600	43,600	52,000
Index	116	99	84	100
Number of miles driven yearly:				
Avg. estimated mileage	15,900	13,900	12,300	14,100
Index	113	98	87	100

Among DIYers, the reasons given for working on their cars are quite similar, although some differences in emphasis are reflected in the replies of major or minor DIYers. In both groups, two-thirds cited cost-savings ("it's cheaper," "to save money") as the prime reason. But major DIYers mentioned that they can be better assured of the quality of the work done (37 vs. 16%), or that "it's enjoyable" (or "a hobby") more often (20 vs. 12%) than minor DIYers. The latter, by way of contrast, cited "convenience" or "it's simply faster" more often (23 vs. 8%) than the former.

Car Servicing and Parts Purchasing

Thus, a mixture of economic and personal competence factors support the growth of do-it-yourself car care. Those who can, do; and (it can be inferred) those with a need to do so learn how or are encouraged to try. This pattern may be adversely affected in the future by the growing complexity of computer-assisted car functions. But countervailing influences --the steady increase in car repair and maintenance costs and fewer convenient service facilities--encourage car owners to seek cost-efficient alternatives. As these market forces are all at work currently, informative advertising that helps do-it-yourselfers to succeed--and car owners in general to seek and find competent help when necessary--can evoke positive responses from aftermarket product consumers. And newspapers offer a highly efficient, hospitable editorial environment for such advertising.

The impacts that do-it-yourself patterns have on various aspects of the auto aftermarket can be seen in a number of other findings of this survey. Non-DIYers, for example, are much more likely to take their car in for check-ups and routine maintenance on a regular basis. DIYers are more likely to wait for the need to become apparent or to do routine servicing themselves. But among those who take their car somewhere for servicing, there is no difference between DIYers and non-DIYers in their loyalty to one favored place of service: nearly three out of four always go to the same place (garage or repair shop, new car dealer, gas station, or other service provider). Finally, DIYers differ substantially from non-DIYers in their gasoline shopping. They are more likely to buy from several stations rather than one, and much more likely to patronize self-service pumps. Here too one can see their buying behavior shaped by a mixture of cost, availability, and self-reliance factors (Table 22).

DIYers also differ markedly from non-DIYers in almost all aspects of aftermarket product consumption. As they are typically responsible for the upkeep of more (and older) cars they are more often faced with the need for replacement parts. Thus, not surprisingly, they are more likely than non-DIYers to buy each of the seven aftermarket products studied, to install

Table 22: Car Servicing and Gas Purchasing

	Major DIYers	Minor DIYers	Non-DIYers	Total PMs
Car checkups/maintenance				
At regular intervals	19%	53%	71%	48%
Only when something wrong	35	43	26	35
Do checkups myself (vol.)	46	3	3	17
	100%	100%	100%	100%
Total (N) =	(406)	(388)	(408)	(1,202)
Servicing: Customer Loyalty				
Always go to same place	72%	72%	76%	73%
Sometimes go to other places	28	28	24	27
	100%	100%	100%	100%
Subtotal *(N) =	(219)	(377)	(399)	(995)

* Base: Only those who have their car serviced: excludes those who do checkups themselves and those NA on place of service.

Questions: Do you take your car in for check-ups or routine maintenance at regular intervals, or only when you think something is wrong?

Do you take your car to be serviced at the same place every time or do you sometimes go to another place?

Where gas is bought				
One station usually	45%	47%	53%	48%
Several stations	55	53	47	52
Type of gas service preferred				
Self-service	84%	71%	51%	69%
Attendant service	11	21	44	25
Doesn't matter	5	8	5	6

these parts themselves in almost all cases, and to show heightened brand sensitivity when purchasing the parts[1]. As shown earlier, DIYers also rely more on newspapers when making their buying decisions for aftermarket products.[2]

To sum up, the do-it-yourself segment of consumers of automotive aftermarket products and services is distinctive in its demographic composition, attitudes, and behavior; increasingly important as potential targets of marketing and advertising strategies; and favorably disposed toward newspapers as a key source of consumer information. At present, men account for the largest proportion of do-it-yourselfers. Thus, advertising that employs differentiated themes and appeals of interest both to men DIYers and non-DIYers as well as to women with car maintenance responsibilities can more adequately serve these three major segments of auto aftermarket consumers.

Newspaper advertising can derive added impact by being linked with editorial service features that are an outgrowth of the do-it-yourself phenomenon, as more and more Americans are caught up in it. As they do more (or find it necessary to do more) of the work on the car or around the house themselves, their need for basic information on price, quality, and availability of products locally expands to include knowledge about how to do minor and major repairs and maintenance. Newspapers are uniquely capable of serving both of these categories of information needs through targeted advertising and editorial content coverage, made available periodically to all types of consumers.

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[1] These differences are documented in Appendix Tables A, B, and C.

[2] See table 16, p. 24.

WOMEN AND CAR CARE

As we have seen, women occupy a place of growing importance in the automotive aftermarket--as car owners or primary maintainers and consequently as consumers of a wide range of car care products and services. In this section of the report, we will highlight some salient differences between women and men PMs that have important implications for the marketing and advertising of aftermarket products to the two groups.

Women comprise 39 percent of our sample of primary car maintainers. Just over one-half (53%) are married, while 27 percent are divorced, widowed or separated, and 20 percent are currently single. The comparable proportions for men are 72, 10, and 18 percent respectively. Thus, women PMs in a near-majority of cases are responsible for the care of their own car; for many of the married women this may also be true, as indicated by the number of cars in the households of these groups of women (Table 23).

Table 23: Number of Cars in Households of Women and Men PMs

	Women			Men
No. of cars in household	Married	Single, formerly married	Total	
one	29%	73%	50%	30%
two	48	19	34	45
three+	23	8	16	25
	100%	100%	100%	100%
(N) =	(246)	(217)	(463)	(739)

The marital status of women PMs is strongly correlated with a number of other demographic characteristics. Those who are single are younger and far better-educated than other women; they are somewhat more likely to be working too. The formerly-married segment of women PMs are appreciably older, with lower incomes and lesser educational attainment than either married or single women PMs. And, linked with these factors of age, income, and sole car ownership, single and married women are more likely than formerly-married women PMs to do at least some car-care tasks themselves (Table 24). Economic pressures that weigh heavily to encourage do-it-yourself car care in general apply to women PMs as well, though to a lesser degree.

Table 24: Demographic and Do-It-Yourself Car Care Patterns Among Women and Men PMS

	Women				Men
	Married	Formerly Married	Single	Total	
(N) =	(246)	(126)	(91)	(463)	(739)
Age:					
18-24	5%	3%	28%	9%	13%
25-34	33	27	39	32	33
35-44	29	22	14	24	23
45-64	33	48	19	35	31
Education:					
some college+	52%	41%	77%	55%	52%
high school grad	40	46	20	37	35
less than high school grad	8	13	3	8	13
Employed:	61%	75%	81%	69%	82%
Income*:					
under $15M	11%	41%	30%	22%	13%
$15M - $24.9M	26	37	26	29	20
$25M - $34.9M	26	8	22	20	24
$35M+	30	10	15	22	33
Do-it-yourself:					
major DIYer	16%	12%	8%	13%	48%
minor DIYer	30	20	44	30	33
non-DIYer	54	68	48	57	19

* Refusals in each group not shown.

The motivation to save money is, if anything, slightly more prominent among women than among men DIYers, even though more men work on their own cars and economizing is also their main stated reason for doing so. Women and men DIYers are alike in their concerns over the quality of repairs or servicing, depending on how extensively members of each group are responsible for such work (Table 25).

Table 25: Reasons for Do-It-Yourself Car Care: Women and Men DIYers

	Women		Men	
	Minor DIYers	Major DIYers	Minor DIYers	Major DIYers
(N) =	(140)	(60)	(248)	(346)
Reasons for doing work on car*				
Save money, cheaper	72%	73%	65%	66%
Be sure of quality of work	14	32	17	38
Convenience, get done faster	25	12	21	20
Enjoyment, as a hobby	7	17	15	8

* Columns add to more than 100%; multiple answers were coded.

Both pressures to economize and self-reliance are reflected in their patterns of gasoline purchasing as well. Women are more likely than men PMs (55 vs. 45%) to buy gas at one station rather than at several, but less likely than men (55 vs. 76%) to prefer to serve themselves. However, women DIYers are similar to men DIYers when it comes to self-service: the more involved they are with car care, the more they prefer to pump their own gas--and to save money by doing so. Economizing and self-reliance motives are also indicated in the way they bring their car in for checkups. Again, as with men, women who are more involved in car care are less dependent on others and less likely to have their car checked and serviced regularly by others. (Table 26). Women DIYers are more likely to patronize a local garage/repair shop than a new car dealer (43 vs. 24%). With women who are non-DIYers the pattern is the reverse (30 vs. 37%). Gas stations are third in order of importance, being used by one-fifth of women in both groups.

Table 26: Gasoline Purchasing and Servicing of Cars by Women and Men PMs

	Women			Men		
	Non-DIYers	Minor DIYers	Major DIYers	Non-DIYers	Minor DIYers	Major DIYers
(N) =	(263)	(140)	(60)	(145)	(248)	(346)
Where gas is bought						
One station usually	55%	50%	62%	50%	45%	42%
Several stations	45	50	38	50	55	58
Type of gas service preferred						
Self-service	46%	63%	78%	57%	74%	85%
Attendant service	50	29	19	31	16	9
Doesn't matter	4	8	3	12	10	6
Car checkups/maintenance						
At regular intervals	67%	60%	23%	79%	50%	18%
Only when something wrong	30	39	40	21	46	34
Do check-ups myself (vol.)	3	1	39	--	4	48

Women bought six out of the seven aftermarket products explored in this study slightly less often than men did.[1] Although they buy these products from the same range of outlets, women patronize auto supply stores less often than men do, primarily because they install the parts themselves much less frequently.[2] And, though women who buy parts are less brand-sensitive than men, women who do any work on their cars themselves are significantly more likely than non-DIY women to specify a brand. (Table 27)[3]

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[1] See Appendix table A for details. Motor oil was the sole exception: almost all PMs bought some within the preceding twelve months.

[2] See table 13, page 20, and Appendix table B.

[3] Mufflers and shock absorbers are not shown because too few women purchased them to permit further analysis.

Table 27: Specifying Brands and Self-Installing of Parts By Women PMs

	Women*		
	Non-DIYers	All DIYers	Total
Motor Oil			
% Specified brand	37	62	47%
% Installed herself	8	52	28%
(N)	(242)	(190)	(432)
Tires			
% Specified brand	37	49	42%
% Installed herself	--	11	6%
(N)	(102)	(116)	(218)
Battery			
% Specified brand	32	47	40%
% Installed herself	4	18	10%
(N)	(74)	(75)	(149)
Spark plug			
% Specified brand	17	48	33%
% Installed herself	1	35	18%
(N)	(131)	(130)	(261)
Oil filter			
% Specified brand	17	37	26%
% Installed herself	2	41	19%
(N)	(224)	(162)	(386)

* Bases for each product (N): women who purchased them in the past twelve months.

The information sources women mainly rely on when shopping for aftermarket products are personal contacts (30%), car dealers (24%), and newspapers (23%). Newspapers are relatively more important for women DIYers than for those who depend on others to service their cars. But both groups of women are better than average readers of the daily and Sunday newspapers. Among non-DIYers, 74 percent read a daily and 73 percent a Sunday paper; among women DIYers, 71 percent read a daily and 70 percent a Sunday. By way of contrast, the average adult readership of newspapers, daily and Sunday, is 67 percent.

Women PMs: A Concluding Note

This analysis has documented some ways in which women car maintainers differ from men in their buying behavior, and also how their participation as consumers in the auto aftermarket is affected by their ability to engage in repair or maintenance work on their own cars--as many now do, at least to some degree.

Their greater dependence on others--family members, friends, dealers--for advice on what to buy and for installation of the products they buy creates special opportunities for targeted advertising that is specifically oriented to women's needs. As a group with primary responsibility for car care, they are cost-conscious, more loyal customers of sales and service outlets that have done good work in the past, and likelier to bring their cars to such outlets regularly for needed parts and labor.

These differences suggest the value of devising and implementing marketing strategies that are tailored to women customers of auto aftermarket products and services. For the majority who rely on others, the convenience of one-stop buying and installation can be a dominant theme, with economy and satisfactory service as strong secondary themes. For women who are do-it-yourselfers, the shopping convenience of sales outlets, staffed by people who can give advice on car care when needed, and the low cost and high quality of products are among the advertising themes best suited to their car-maintenance needs.

For both groups of women consumers, the newspaper offers an efficient means of reaching them with information that is timely, in a print advertising context highly familiar to them, one that they rely on as cost-conscious shoppers for a wide range of products.

WARRANTY AND SERVICE PROTECTION PLANS

To complement the survey's coverage of automotive aftermarket topics, information was gathered on cars owned by primary maintainers, their auto purchase intentions, and the relative importance of warranty and extended service protection plans in their car-buying decisions. This section of the report will review the findings on these topics, focusing in particular on recent or prospective new car buyers.

Car Ownership

A majority (62%) of primary car maintainers live in households with more than one car available. Of these, 40 percent live in two-car, 16 percent in three-car, and 6 percent in four-plus car-owning households. Just over one-half (53%) of these cars were bought new, a proportion that applies equally to cars in households with only one and more than one car. New cars were more prevalent among upscale car owners, those most able to afford the larger initial investment. But both the sheer number of cars owned by PMs and the substantial proportion bought as used cars materially affect the desire of PMs in every income category to economize when buying auto aftermarket products and services.

Four out of five (79%) cars owned by PMs were identified as American-made. Among the imports, Toyota, Datsun (Nissan), and Volkswagen were favored: these three makes jointly accounted for nearly three-fifths (58%) of all identified foreign cars. Ownership of imports was more prevalent among PMs earning $35,000-plus, the college-educated, and those living in the West. But only one PM in ten lived in a household with only one or more imported makes, compared with 69 percent who had access only to American-made cars. In the remaining one-fifth of households, both American-made and imported cars were present. As we shall see, the makes owned currently have a bearing on PMs' future car-buying intentions.

Car-Buying Intentions

When interviewed (early in 1984), 28 percent of this PM sample said they planned "to buy another car within the next twelve months." They were asked some other questions about their purchase intentions, and their answers showed the strong influence of economic factors (as well as current car ownership) on the kind of cars they intended to buy. For example, a purchase of a new car is projected by three-fifths (60%) of those planning to buy. But among those who only own cars initially bought new (or a mix of new and used cars), this proportion is significantly greater. A key to understanding this relationship is the correlation of income with car purchase intentions: those earning $35,000-plus are almost twice as likely as those earning less than $15,000 (74 vs. 40%) to be planning to buy a new car. And major do-it-yourselfers are significantly less likely to be thinking of a new car. As we saw earlier, they are drawn primarily from low or moderate income groups. Finally, the link between income and age is implicated in the significantly stronger intentions of those over age 45 (who earn more) to buy a new car (Table 28).[1]

Income, age, and current car ownership are also linked with the intention to buy an American-made vs. an imported car. Younger PMs who plan

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[1] Comparisons among subgroups in this table are substantially affected by their sizes, given that only 28 percent of all PMs indicated an intention to buy a car.

Table 28: Car Buying Plans

	New or Used?**		American or Foreign?**	
	New	Used	American	Foreign
Total PMs planning to buy*	60%	33%	73%	21%
Men	58	36	75	22
Women	65	28	69	20
Age				
18-34	59	36	66	27
35-44	49	44	72	19
45-64	73	18	83	12
Income				
under $15M	40	56	85	6
$15-$24.9 M	57	33	72	17
$25-$34.9M	60	32	79	16
$35M+	74	24	63	34
Do-it-yourself				
Major DIYer	49	45	81	16
Minor DIYer	63	28	70	27
Non-DIYer	70	26	67	19
No. of cars in household				
one	56	35	69	22
two	62	33	75	20
three+	65	32	75	19
Car(s) owned currently***				
New car(s) only	88	12	--	--
Used car(s) only	41	59	--	--
Both new and used	70	30	--	--
Domestic car(s) only	--	--	86	14
Foreign car(s) only	--	--	56	44
Both domestic and foreign	--	--	53	47

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[*] Base for both questions: PMs planning to buy a car in next 12 months (N=332).

[**] Those who were "not sure" are not shown.

[***] Those who were "not sure" were excluded from the base.

to buy a car are more strongly oriented to imported makes, as are those with incomes over $35,000. These two groups may well be looking at cars in different price classes, however, since those under age 35 typically earn less than older PMs. But the strongest link exists between the cars now owned and the make one intends to buy. The minority planning to buy a car who *already* own an import are, as a group, the ones most favorably disposed to buying another foreign car in the future (Table 28).[1]

These findings on car-buying intentions show that *affordability* and *past experience* with cars heavily condition the preferences of potential car buyers, once the need for another car (addition or replacement) is acknowledged. These two remain influential in guiding subsequent consumer choices among aftermarket products and services, along with the elements of *self-reliance* and *economic necessity* that, as we saw earlier, underlie the growing do-it-yourself phenomenon.

Warranty Coverage and Service Protection Plans

Nearly two-thirds (65%) of all sampled PMs had ever bought a new car; 26 percent had bought a new car more recently, i.e. the past three (1982-84) model years. Demographic differences between all PMs and those who had ever bought new cars are negligible.

PMs in general, as we saw earlier, are above average readers of daily and Sunday newspapers. Those who had ever bought a *new* car are appreciably more devoted readers: 77 percent read a daily yesterday and 78 percent read a Sunday paper in the preceding week, compared with an average readership of 67 percent daily and Sunday.

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[1] Purchase intentions of prospective car buyers at the end of 1984 were quite similar to these, as shown in a Dun & Bradstreet survey of over 500,000 prospects reported in a "M.I.N. Research Alert" newsletter (Dec. 14, 1984, p. 8). Of prospects owning only foreign cars, 51 percent favored an American make; of those owning only American cars, 85 percent planned to buy one; and among those owning both American and imported cars, 63 percent said they intended to buy an American car.

New car purchasers were asked a series of questions about warranty coverage for the last new car they had bought. Eight of nine (89%) confirmed that it had been covered by a manufacturer's warranty plan. Among more recent (1982-84 model) new car buyers, 94 percent said a warranty had been in force. But the details of coverage were less sharply etched in their memory: less than one-half (47%) recalled any of the details. Men were appreciably more likely to remember specific details of coverage than women, and (as expected) those who had bought a new car most recently were more mindful of specific aspects of their plan's coverage. But no important differences existed among those who did recall anything about their plan's coverage: the three elements of warranty plans that were identified with some consistency were the time, the mileage, and major parts coverage. (Table 29).

Buyers of warrantied new cars were asked whether they had also been offered an optional extended service protection plan at the time of purchase. Almost three in five (59%) said that they had: men PMs were more likely than female PMs to recall such an offer. Recent (1982-84 model) new car buyers were significantly more likely to have been offered extended coverage: 70 percent recalled getting an offer at the time of purchase. But their memories of specific details of extended service protection plans were not sharply defined. Slightly more than one-third (36%) of PMs offered the chance to purchase coverage under such a plan actually remembered any of its details. (Table 30).

Table 29: Warranty Coverage Recalled by New Car Buyers, by Sex and Recent Buyers (1982-84 Models)

	New Car Buyers			1982-84 Model Buyers
	Total	Men	Women	
1. Was car covered by warranty? % Yes	89%	89%	89%	94%
(N) [a]	(781)	(486)	(295)	(306)
2. Remember any details of coverage? % Yes	47%	53%	36%	56%
(N) [b]	(695)	(432)	(263)	(287)
3. Which details of coverage? [c]				
Time Period	75%	74%	77%	75%
Mileage	71	73	64	70
Major Parts	12	12	14	15
(N) [d]	(326)	(229)	(95)	(161)

[a] Base: those who have ever bought a new car.
[b] Base: those covered by warranty.
[c] Time: 12 months; 2 years; 5 years, etc.
Mileage: 12,000 miles; 24,000 miles, etc.
Major parts: covered everything mechanical, except if by nature or accident; engine, etc.
[d] Base: those who remember details.

Questions: When you bought your last new car, was it covered by a manufacturer's warranty plan? Can you remember any details about the warranty plan? What are they?

As with warranties, the two aspects of plan coverage most often recalled were the time period (specified by 56 percent) and mileage (specified by 35 percent). The cost of the optional plan was recalled by almost one-fifth (19%); 16 percent mentioned that the plan "covered almost everything."[1]

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[1] Demographic group differences in recall are rendered unreliable by the small numbers of eligible PMs answering this sequence of questions.

Table 30: Extended Service Protection Plan Recalled by New Car Buyers, by Sex and Recent Buyers (1982-84 Models)

	Total	Men	Women	1982-84 Model Buyers
1. Were you offered an extended service protection plan?				
% Yes	59%	62%	53%	70%
(N) [a]	(695)	(432)	(263)	(287)
2. Remember any details of plan?				
% Yes	36%	37%	34%	45%
(N) [b]	(407)	(268)	(139)	(200)
3. Which details of plan?				
Time period	56%	61%	45%	53%
Mileage	35	46	12	37
Cost	19	22	12	22
Covered almost everything	16	12	25	18
(N) [c]	(147)	(99)	(47)	(90)

[a] Base: those covered by a warranty.
[b] Base: those who were offered an extended protection plan.
[c] Base: those who remember details.

Question: At the time you bought your last new car, were your offered an extended service protection plan that you could buy? Can you remember any details about the plan? What are they?

It is clear from these results that extended service protection plans are not being uniformly offered, even to recent new car buyers. Nor are the specifics of the various plans clearly defined in car buyers' minds. These two conclusions suggest that more aggressive promotion at the point of purchase and more easily understood advertising are needed to establish the realistic market potential of such plans.

Only one-third (34%) of new car buyers offered an optional protection plan that extended their warranty coverage actually bought it. Among those who found it to be an attractive option were the following groups: women, young PMs (18-24), those with less education or low income, and the unemployed. These groups have been shown in other findings to be among the most cost-conscious in their aftermarket shopping and buying. Here it becomes apparent that this attitude colors evaluations of service protection plans as well. Three closely related reasons were offered by those who did not buy such a plan: lack of any felt need; the option was "too costly"; or it "wasn't worth the money." In effect, the plan's cost-benefit ratio was unfavorable in their eyes (Table 31).

Table 31: Purchase of Extended Service Protection Plan and Reasons for not Purchasing, by Sex and Buyers of 1982-84 Models

	Total	Men	Women	1982-84 Model Buyers
1. Did you purchase the extended service protection plan? % Yes	34%	31%	42%	40%
(N) [a]	(407)	(268)	(139)	(200)
2. Why didn't you purchase?				
No need/unnecessary	32%	31%	33%	38%
Too expensive	21	21	21	21
Not worth the money	19	21	16	20
(N) [b]	(266)	(185)	(81)	(119)

[a] Base: those who were offered an extended service protection plan.
[b] Base: those who did not purchase the plan.

Recall of recent advertising by manufacturers or dealers of warranty coverage or extended service protection plans available to new car buyers is not extensive among sampled primary maintainers. Only 50 percent said they had "recently read or heard" anything about manufacturers' warranty plans, and 46 percent acknowledged awareness of ads about "additional service protection plans that new car buyers can purchase." The same groups claimed higher recall of both types of ad messages: men, those with higher income or education, and major do-it-yourselfers.

The Importance of Warranty and Extended Service Protection Plans

To gauge the relative importance of these two plans as influences upon the purchase decisions of new car buyers and others, nine elements that might affect such decisions were tested. "Reliability" and "quality and value" lead the list, rated as "very important" by more than nine out of ten sampled PMs. Four other elements--"performance and handling," "availability of replacement parts," "overall cost of car," and "comfort when driving"--were rated highly by two-thirds or more of the PMs. The two service plans, by way of contrast, were eighth and ninth in order of importance. (Table 32)

Table 32: Importance of Nine Elements* in Car-Buying Decisions

	Degree of Importance:**		
	Very important	Somewhat important	Not important
Reliability	94%	5%	1%
Quality and value	91	8	1
Performance and handling	75	22	3
Availability of replacement parts	75	21	4
Overall cost of car	70	25	5
Comfort when driving	65	31	4
Economical to operate	57	36	7
Warranty coverage	50	38	12
Extended service protection plan	30	37	33

* Base: All PMs for each of the nine elements.

** "No opinions" were excluded from these results: In no case did they exceed 5%.

Question: In general, how important are each of these factors when you are deciding what kind of car to buy--very important, somewhat important, or not important?

A follow-up question on these elements yielded results that reinforce the lesser importance accorded to these two service plans in prospective car buyers' estimations. Each PM was asked to choose the one "most important" factor among those s/he had indicated previously was "very important." By this forced choice among highly-rated elements, "reliability" and "quality and value" retain their place at the top of the list of influential factors. But the "overall cost of the car" rises in importance to third. And once again, the two service plans are at or near the bottom in order of importance, not only among PMs in general but also among prospective or recent new car buyers. (Table 33)

Table 33: The Most Important Element in Car-Buying Decisions

	Total PMs	New Car Prospects[a]	Recent New Car Buyers[b]
N =	(1202)	(199)	(306)
Reliability	28%	25%	32%
Quality and value	20	22	20
Overall cost of car	19	20	15
Performance and handling	9	8	12
Economical to operate	8	10	5
Comfort when driving	7	9	11
Warranty coverage	3	3	2
Availability of replacement parts	3	1	2
Extended service protection plan	2	2	1
	100%	100%	99%

[a] Base: PMs who intend to buy a new car in the next 12 months.

[b] Base: PMs who bought a recent (1982-84 model) new car.

Analysis of rankings made by different groups of PMs showed that those under the strongest economic pressures--women, low income PMs, the nonemployed--are somewhat likelier to place warranty or service protection plans higher in their scale of values. As we have seen elsewhere, they are the most cost-conscious of all demographic segments, across a range of prospective or actual aftermarket purchases. This suggests the value of a differentiated advertising and sales-promotion strategy, one that stresses the added value of such protection plans to high-status car-buying prospects, and the real cost savings and greater control over future maintenance bills for those most sensitive to such appeals because of limited economic resources.

Promoting and Advertising Extended Service Protection Plans

The results of these probes suggest the following conclusions:

1. Warranty coverage is nearly universal for new cars, but areas of ambiguity exist in consumers' minds when it comes to the actual terms of coverage, apart from time and mileage limitations.

2. Extended service protection plans are not seen as generally available, nor are their details highly salient. This suggests that, as a relatively new type of consumer service being made available, their full potential has yet to be realized.

3. Only about one-third of PMs offered an optional service protection plan purchase it, which further supports the conclusion that the full market potential of such an option has not yet been established. It is not seen by a large majority of car buyers as either necessary or cost-effective.

4. Given the fact that half or fewer of all PMs acknowledged recent exposure to ad messages or other information about these types of plan

coverage, it is clear that more advertising can play a significant role in building awareness and in enhancing the perceived value of such plans as benefits to the new car buyer.

5. At present (and probably for different reasons), neither warranty coverage nor the availability of extended service protection plans looms large as motivating factors in new-car buying decisions. The people with the greatest economic incentive to protect themselves, however, not only view such plans more favorably but they also are more likely to purchase the latter.

6. All this suggests that cost-benefit considerations need to be addressed explicitly (and in plain language) when communicating with future prospects, rather than the highly detailed "warranty-type" coverage information that is prominent in much current advertising. The plan's basic values for consumers must first be established in their minds before the fine print can assume much importance.

CONCLUSIONS AND RECOMMENDATIONS

This survey took a fresh look at a key segment of consumers of auto aftermarket products and services: the primary maintainers who are prime prospects because of their demonstrably more active role in car care. What follows are a few general conclusions and recommendations flowing from its findings.

o With the steady decline in the availability of local gas stations (and mechanics), and the growing prominence of self-service installations, car owners are being forced into new patterns of car care. Moreover, changes in the composition of households--particularly the explosive growth of single-person households--have placed added stress on individual self-reliance. These changes have fed the do-it-yourself movement, with its strong appetite for more consumer information about products and techniques of car care.

o The do-it-yourself segment of automotive aftermarket consumers is becoming more diversified: women, older car owners, and higher income car maintainers are increasingly doing some work on their own cars. Advertising that is targeted to their specific needs and preferences will be more cost-effective.

o Women now constitute a sizable and distinctive segment, making decisions that account for a significant share of revenues earned by manufacturers, dealers, and other sales and installation outlets. Advertising campaigns and placements do not yet take adequate account of their growing importance.

o Parts purchasing is a year-round necessity for car maintainers, especially for those in multiple car-owning households. Frequent advertising in newspapers that takes account of the "thin-market" concept[1] can keep ad sales messages in front of prospects whenever the need for parts replacement or service arises.

o The age of specialization is becoming more evident when it comes to place-of-purchase installation of auto aftermarket products. Sellers need to emphasize not only availability and price but also their special expertise, stressing one-stop buying and installation. The two go together more often than not, especially among women and non-DIYers.

o Sales outlets offering both aftermarket products and services might build greater customer response by stressing the knowledgeability of staff and the convenience of one-stop, integrated car care, rather than placing emphasis on brand-identification in their ad messages.

o Tire-buying often takes place on a deferred basis. A safety-promoting ad campaign, using "low-threat" messages, can encourage laggard consumers to buy replacement tires soon after the need to do so is recognized.

o Newspapers are the prime medium that car maintainers look to for information about car care products and services. Car dealers and other sales and service outlets are natural allies with the local newspaper in meeting people's needs for timely, reliable information. And as this survey has shown, car maintainers--who make most of the decisions about car car--are above average readers of newspapers, both daily and Sunday.

o The convention of placing automotive advertising mainly in the sports and classified sections of the newspaper is challenged by findings of this survey that show a substantial proportion of prime prospects lacking firm expectations about where to find automotive advertising. Placing some ads in other sections of the paper (e.g. general news, lifestyle) can get an advertiser's message in front of a larger, more diversified set of prospects. As the responsibility for car maintenance becomes more widely shared, the opportunities to reach potential customers through the newspaper expand to include sections that enjoy substantial reader traffic by groups not previously considered as prime prospects. This widens the scope for creative treatment to take advantage of complementary editorial environments, and for scheduling and positioning of ads based on a clearer, more differentiated perception of target groups of active consumers in the automotive aftermarket.

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[1] During any given week, only a small proportion of consumers buys a particular product, and the great majority of purchases are not planned as much as seven days ahead. See "How America Shops and Buys" (Newspaper Advertising Bureau, 1983) for an analysis of the concept.

# #

APPENDIX

Table A: Purchase of Seven Products in Past Year
(based on total primary maintainers)

	Motor oil	Oil filter	Spark plugs	Tires	Car battery	Muffler	Shock absorber
Total PM sample:	95%	89%	65%	54%	37%	22%	18%
Sex:							
Male	96	92	69	57	40	24	21
Female	94	84	57	48	33	18	13
Age:							
18-24	96	88	68	52	38	23	19
25-34	97	89	69	51	31	20	19
35-44	94	91	67	57	38	20	16
45-54	97	91	63	59	39	24	22
55-64	93	86	54	50	45	25	13
Household income:							
under $15M	97	85	64	46	38	23	14
$15M-$24.9M	95	90	65	57	37	21	18
$25M-$34.9M	96	90	68	59	39	20	19
$35M +	95	92	63	53	35	23	18
Education:							
some college +	95	89	64	53	36	21	17
high school grad	95	90	64	52	36	22	19
less than high school grad	98	87	71	62	45	27	19
Marital status:							
married	95	91	67	56	39	24	19
divorced, separated, widowed	97	86	63	49	32	18	12
single (never married)	93	86	59	49	35	18	18
Employment:							
employed	95	90	66	54	36	21	18
not employed	96	85	61	53	42	23	16
Occupation (selected):							
professional/managerial	95	90	68	55	42	20	23
clerical/sales	95	90	63	57	42	20	18
craftsman/foreman	96	93	69	59	36	23	22
Region:							
East	93	84	61	55	31	30	21
Mid-West	93	90	65	47	38	27	18
South	98	94	66	58	42	17	15
West	96	87	66	55	36	11	18
City size:							
metro	95	87	63	49	37	19	17
suburbs	96	90	64	55	36	23	19
non-metro	94	91	67	57	39	23	17
Newspaper readership:							
read yesterday	96	90	65	55	38	22	18
frequent reader (4-5 days)	95	90	65	54	38	21	17
infrequent reader (0-3 days)	95	87	64	54	36	23	19
Sunday reader	96	90	65	53	37	22	17
Do-it-yourself:							
do major repairs, maintenance	97	96	79	60	42	28	23
do minor repairs, maintenance	96	85	61	54	38	20	18
non do-it-yourselfer	93	86	54	47	32	17	13
Number of cars in household:							
one	95	84	58	47	34	21	16
two	95	92	66	53	35	20	16
three +	97	93	74	66	46	27	25
New car purchasers (1982-84 models):	90	86	50	36	23	15	13

Question: During the past 12 months which of these replacement parts, if any, did you buy?

Table B: Percent Who Installed the Replacement Part by Themselves

(based on replacement parts purchasers)

	Motor oil	Oil filter	Spark plug	Car battery	Shock absorber	Muffler	Tires
Total purchasers:	56%	51%	50%	43%	37%	28%	18%
Sex:							
Male	74	68	66	60	49	34	25
Female	28	19	18	10	8	16	6
Age:							
18-24	67	61	62	55	*	*	33
25-34	63	58	58	47	47	31	21
35-44	55	47	45	47	32	31	16
45-54	53	38	41	47	*	19	13
55-64	43	50	39	33	*	16	14
Household income:							
under $15M	55	51	46	41	*	29	19
$15M-$24.9M	54	49	51	37	35	30	21
$25M-$34.9M	57	53	56	55	43	22	20
$35M +	58	52	46	40	35	29	15
Education:							
some college +	54	46	42	40	31	24	13
high school grad	56	52	56	41	40	30	23
less than high school grad	71	68	65	60	*	*	26
Marital status:							
married	61	57	54	50	39	30	18
divorced, separated, widowed	41	32	35	20	*	*	14
single (never married)	56	48	47	39	*	33	22
Employment:							
employed	58	52	52	45	38	29	17
not employed	52	45	46	34	32	25	22
Occupation (selected):							
professional/managerial	54	49	46	43	*	*	15
clerical/sales	31	27	33	27	*	*	6
craftsman/foreman	82	80	83	66	*	*	27
Region:							
East	53	47	41	34	28	23	16
Mid-West	57	56	52	54	46	27	21
South	54	47	52	39	40	33	19
West	64	53	53	45	35	*	17
City size:							
metro	49	40	41	35	34	12	13
suburbs	58	53	51	47	38	29	18
non-metro	61	57	57	47	39	40	23
Newspaper readership:							
read yesterday	55	50	48	43	36	26	17
frequent reader (4-5 days)	54	49	48	43	35	24	18
infrequent reader (0-3 days)	62	55	54	43	39	36	20
Sunday reader	55	49	49	43	36	27	18
Do-it-yourself:							
do major repairs, maintenance	89	85	86	73	67	54	36
do minor repairs, maintenance	68	58	44	38	23	12	13
non do-it-yourselfer	11	5	3	9	--	2	2
Number of cars in household:							
one	46	39	38	29	31	19	14
two	61	57	54	50	38	26	21
three +	66	56	59	51	42	44	21
New car purchasers (1982-84 models):	50	45	44	40	*	28	8

* Number of cases too small for reliability.

-- Less than 1%.

Table C: Specified Brand When Purchasing Aftermarket Products
(based on purchasers of each product)

	Motor oil	Spark plugs	Tires	Car battery	Shock absorber	Oil filter	Muffler
Total Purchasers:	59%	52%	50%	46%	42%	41%	30%
Sex:							
Male	66	62	54	50	46	50	31
Female	47	33	42	40	31	26	25
Age:							
18-24	64	58	55	52	*	47	*
25-34	60	55	52	47	42	44	27
35-44	58	49	47	38	43	40	41
45-54	59	46	50	49	*	37	31
55-64	55	52	44	48	*	36	19
Household income:							
under $15M	63	52	44	46	*	39	27
$15M-$24.9M	58	54	45	45	37	41	27
$25M-$34.9M	59	54	48	53	42	44	27
$35M +	59	50	58	43	41	41	34
Education:							
some college +	53	45	49	47	37	36	29
high school grad	62	55	49	44	41	45	25
less than high school grad	75	70	59	51	*	51	*
Marital status:							
married	62	55	52	47	42	44	33
divorced, separated, widowed	51	44	40	36	*	32	*
single (never married)	54	47	50	51	*	38	26
Employment:							
employed	58	51	50	45	41	40	27
not employed	61	55	51	50	46	43	35
Occupation (selected):							
professional/managerial	56	53	59	56	*	44	*
clerical/sales	46	34	38	40	*	23	*
craftsman/foreman	76	74	52	42	*	55	*
Region:							
East	43	44	43	41	35	33	27
Mid-West	60	51	54	47	57	43	26
South	66	60	55	49	33	45	35
West	63	48	44	46	44	39	*
City size:							
metro	53	46	43	47	41	34	27
suburbs	57	51	53	50	47	39	33
non-metro	65	58	53	42	37	49	27
Newspaper readership:							
read yesterday	58	52	49	48	44	40	28
frequent reader (4-5 days)	58	52	49	48	44	38	29
infrequent reader (0-3 days)	60	53	51	42	38	46	30
Sunday reader	58	52	49	46	39	39	28
Do-it-yourself:							
do major repairs, maintenance	80	78	60	55	63	61	39
do minor repairs, maintenance	62	46	50	47	30	42	26
non do-it-yourselfer	33	19	37	32	18	17	19
Number of cars in household:							
one	50	41	47	41	37	33	22
two	62	54	48	48	41	44	30
three +	68	64	57	49	49	47	37
New car purchasers (1982-84 models):	55	50	56	47	*	37	33

* Number of cases too small for reliability.

Table D: Characteristics of the Sample

	Unweighted Number	Weighted Number*
Total PM sample:	1202	1446
Sex:		
Male	739	887
Female	463	559
Age:		
18-24	131	160
25-34	388	467
35-44	281	337
45-54	181	216
55-64	205	247
Household income:		
under $15M	193	237
$15M-$24.9M	280	340
$25M-$34.9M	280	338
$35M +	350	413
Education:		
some college +	630	755
high school grad	434	518
less than high school grad	132	165
Marital status:		
married	778	929
divorced, separated, widowed	195	243
single (never married)	226	271
Employment:		
employed	925	1109
not employed	277	337
Occupation (selected):		
professional/managerial	143	172
clerical/sales	118	142
craftsman/foreman	168	204
Region:		
East	333	333
Mid-West	342	383
South	327	448
West	200	282
City size:		
metro	365	437
suburbs	437	521
non-metro	400	488
Newspaper readership:		
read yesterday	868	1033
frequent reader (4-5 days)	800	950
infrequent reader (0-3 days)	401	495
Sunday reader	871	1042
Do-it-yourself:		
do major repairs, maintenance	406	495
do minor repairs, maintenance	388	463
non do-it-yourselfer	408	488
Number of cars in household:		
one	461	547
two	485	584
three +	256	315
New car purchasers (1982-84 models):	306	371

* Weighted to the proportion of car-owning households in the four regions of the U.S., based on Gallup surveys.

THE QUESTIONNAIRE

M[ ] F[ ] ___

INTERVIEWER'S ID#: __________
TIME STARTED: __________
TIME ENDED: __________
LENGTH: __________
GO# 8436

INTERVIEWER'S NAME:
____
DATE: __________
SPOT: __________

1984 Automotive Aftermarket Study

SCREENER FOR ELIGIBILITY: Hello, this is ________ from The Gallup Organization. We are conducting an opinion survey on cars. Does anyone in your household own a car?

1[ ] Yes -- ASK Q. 1a
2[ ] No -- TERMINATE

1a. I would like to talk to the person who usually decides when and where your car is repaired or serviced. Are you that person?

1[ ] Yes -- ASK:
↓
1b. And are you between the ages 18-64?

1[ ] Yes -- ASK Q. 2
2[ ] No -- TERMINATE

2[ ] No -- ASK:
↓
1c. When might I be able to call back and talk with that person?

____
(SET UP APPOINTMENT DATE)

And is that person between the ages of 18-64?

1[ ] Yes
2[ ] No -- TERMINATE

IMPORTANT: IF TERMINATED, FILL IN SPOT NUMBER

2. How many cars do you and your family now own? (DO NOT INCLUDE LEASED CARS, OR COMPANY CARS.)

1[ ] One
2[ ] Two
3[ ] Three
4[ ] Four or more

ASK Q. 3, 4 & 5 FOR EACH CAR MENTIONED IN Q. 2. CHECK EACH ANSWER BELOW.

(IF TWO OR MORE CARS): Let's begin with the car that you bought most recently.

3. What make and model is your (most recent, next most recent) car (e.g., Chevrolet, Impala)?

	Q. 3		
	1st Car	2nd Car	3rd Car
Make:	________	________	________
Model:	________	________	________

4. What model year is it?

	Q. 4		
Model Year			
1984	1[ ]	1[ ]	1[ ]
1983	2[ ]	2[ ]	2[ ]
1982	3[ ]	3[ ]	3[ ]
1981	4[ ]	4[ ]	4[ ]
1980	5[ ]	5[ ]	5[ ]
1979 or older	6[ ]	6[ ]	6[ ]
No second or third car		0[ ]	0[ ]

5. Was it bought new or used?

	Q. 5		
New	1[ ]	1[ ]	1[ ]
Used	2[ ]	2[ ]	2[ ]

(IF ANY NEW CAR BOUGHT, ASK Q. 6-9)
(IF NO NEW CAR BOUGHT, SKIP TO Q. 12)

6. When you bought your last new car (IN Q. 5), was it covered by a manufacturer's warranty plan?

1[ ] Yes -- ASK Q. 8
2[ ] No — SKIP TO Q. 12
y[ ] Don't know — SKIP TO Q. 12

IF "YES", ASK:

7. Can you remember any details about the warranty plan?

1[ ] Yes (ASK): What are they? (DO NOT PROBE: RESPONSE CAN INCLUDE HOW MANY MONTHS, MILEAGE OR PARTS COVERED BY THE WARRANTY, ETC.)

____

____

____

2[ ] No

8. At the time you bought your last new car, were you offered an extended service protection plan that you could buy?

1[ ] Yes -- ASK Q. 9
2[ ] No
y[ ] Don't know
— SKIP TO Q. 12

IF "YES", ASK:

9. Can you remember any details about it?

1[ ] Yes (ASK): What are they? (DO NOT PROBE: RESPONSE CAN INCLUDE LENGTH OF TIME, MILEAGE, OR PARTS COVERED BEYOND THE WARRANTY PERIOD, ETC.)

____

____

____

2[ ] No

10. Did you buy it?

1[ ] Yes -- SKIP TO Q. 12
2[ ] No -- ASK Q.11

11. Why not? ____

____

ASK EVERYONE:

12. Have you recently read or heard anything about manufacturers' warrenties now being offered to new car buyers?

1[ ] Yes
2[ ] No

13. And have you recently read or heard anything about additional or extended service protection plans that new car buyers can purchase?

1[ ] Yes
2[ ] No

14. Do you usually buy gasoline at one specific gas station, or do you buy gas at several stations?

1[ ] Buy gas at one station
2[ ] Buy at several stations

15. Do you prefer to fill the car yourself at a "self-serve" facility, or do you prefer to have it filled by an attendant?

1[ ] Fills car self
2[ ] Prefers attendant
3[ ] Doesn't matter (VOLUNTEERED)
y[ ] No self-service in this area (VOLUNTEERED)

16. Now, thinking only of the car you drive most often:

17. What type of transmission does this car have, automatic or manual?

1[ ] Automatic
2[ ] Manual

18. Approximately how many miles is this car driven in one year? (WRITE IN ANSWER AND CHECK RANGE.)

____________ approximate miles per year

1[ ] Under 5,000
2[ ] 5,000-9,999
3[ ] 10,000-14,999
4[ ] 15,000-19,999
5[ ] 20,000 and over
y[ ] Can't estimate

19. About how many miles are on the car now? (WRITE IN ANSWER AND CHECK RANGE.)

____________ total number of miles

1[ ] Under 20,000
2[ ] 20,000-39,999
3[ ] 40,000-59,999
4[ ] 60,000-79,999
5[ ] 80,000 and over
y[ ] Can't estimate

20. Do you plan to buy another car within the next 12 months?

1[ ] Yes -- ASK Q. 21-23
2[ ] No -- SKIP TO Q. 24

IF "YES" IN Q.20, ASK :

21. Will it probably be a new car or a used car?

1[ ] New
2[ ] Used
y[ ] Not sure

22. What size do you think it will be? That is, will it be a subcompact, a compact, an intermediate, a standard, or a luxury-size car?

1[ ] Subcompact (e.g., Rabbit, Escort, Chevette, Lynx, Firebird, Civic, Alliance)
2[ ] Compact (e.g., Reliant, Skylark, Aries, Citation, Firebird, Camaro, Mustang, Accord, Corolla, Tempo)
3[ ] Intermediate (e.g., Cutlass, Sup/Sedan, Regal Coupe/Sedan, New Yorker, Malibu)
4[ ] Standard (full size) (e.g., Oldsmobile 88/98, Le Sabre/Electra, Grand Marquis)
5[ ] Luxury (e.g., Cadillac, Mercedes, Lincoln, Toronado)
y[ ] Not sure

23. Are you more likely to buy an American, or a foreign car?

1[ ] American make
2[ ] Foreign make
y[ ] Not sure

ASK EVERYONE:

24. In general, how important are each of these factors when you are deciding what kind of car to buy -- very important, somewhat important or not important? READ LIST AND RECORD UNDER Q. 24.)

	Q. 24				Q. 25
	Very Important	Somewhat Important	Not Important	No Opinion	Most Important
a. The overall cost of the car	1[ ]	2[ ]	3[ ]	y[ ]	1[ ]
b. Quality and value	1[ ]	2[ ]	3[ ]	y[ ]	2[ ]
c. Reliability	1[ ]	2[ ]	3[ ]	y[ ]	3[ ]
d. Economical to operate	1[ ]	2[ ]	3[ ]	y[ ]	4[ ]
e. Availability of replacement parts	1[ ]	2[ ]	3[ ]	y[ ]	5[ ]
f. Performance and handling	1[ ]	2[ ]	3[ ]	y[ ]	6[ ]
g. Warranty coverage	1[ ]	2[ ]	3[ ]	y[ ]	7[ ]
h. Comfort when driving	1[ ]	2[ ]	3[ ]	y[ ]	8[ ]
i. Extended service protection plan	1[ ]	2[ ]	3[ ]	y[ ]	9[ ]

25. Which one of the factors you told me were very important (REPEAT) is the most important of all? (CODE ONLY ONE UNDER Q. 25. FORCE CHOICE.)

26. Which of these statements best describes the amount of car maintenance and repair work you yourself do? (READ AND CHECK ONE ANSWER.)

1[ ] I do little or nothing to the car myself -- SKIP TO Q. 28
2[ ] I do minor jobs like change the oil or anti-freeze
3[ ] I do some major jobs like engine tune-ups and repairs
4[ ] I do practically everything that needs to be done

— ASK Q. 27

FOR THOSE WHO WORK ON THEIR CAR, ASK:

27. What are the main reasons why you work on the car yourself? (PROBE): Any other reasons? DO NOT READ LIST.

1[ ] Cheaper/Save money
2[ ] For enjoyment/Hobby
3[ ] More convenient/Faster
4[ ] Sure of quality of work
x[ ] Other: (Please specify) ______________________

28. Do you take your car in for check-ups or routine maintenance at regular intervals or only when you think something is wrong?

1[ ] Regular intervals
2[ ] Only when think something is wrong
3[ ] Do check-ups myself (VOLUNTEERED) SKIP TO Q. 34

29. Where do you usually have your car serviced? READ LIST.

1[ ] New car dealer
2[ ] Gasoline service station
3[ ] Garage/Repair shop
4[ ] Tire service center
5[ ] Some other place (Please specify): ______________________________
0[ ] Do it myself/Don't take car anywhere (VOLUNTEERED) SKIP TO Q. 34

30. Why do you take your car to that particular place? (DO NOT READ LIST, BUT PROBE FOR REASONS. DO NOT ACCEPT "Convenient," ASK, "Why is it convenient?" PROBE: Anything else?)

1[ ] Good location
2[ ] Better service
3[ ] Less expensive
4[ ] Better value
5[ ] Will guarantee work
6[ ] Like or know personnel
7[ ] Good reputation -- well-known
8[ ] Car is still under warranty
x[ ] Other (Please specify): ______________________________

31. Do you take your car to be serviced to the same place every time, or do you sometimes go to another place?

1[ ] Same place -- SKIP TO Q. 34
2[ ] Another place -- ASK Q. 32 and Q. 33

32. What type of place was that?

1[ ] New car dealer
2[ ] Gasoline service station
3[ ] Garage/Repair shop
4[ ] Tire service center
x[ ] Other (Please specify): ______________________________

33. Why do you take your car to this other place? (DO NOT READ LIST, BUT PROBE FOR REASONS, DO NOT ACCEPT "Convenient," ASK, "Why is it convenient?" PROBE: Anything else?)

1[ ] Emergency repair needed
2[ ] Good location
3[ ] Better service
4[ ] Less expensive
5[ ] Better value
6[ ] Will guarantee work
7[ ] Like or know personnel
8[ ] Good reputation -- well-known
9[ ] Car is still under warranty
x[ ] Other (Please specify): ______________________________

34. During the past 12 months which of these replacement parts, if any, did you buy? (READ LIST OF SEVEN PARTS IN Q. 34 CHECK YES/NO IN EACH COLUMN.)

Purchased?		Motor Oil	Tires	Spark Plugs	Battery	Muffler	Shocks	Oil Filter
	Yes	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]
	No	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]

35. From what type of place or store did you purchase that/those (PARTS MENTIONED)? FOR EACH PART BOUGHT, CHECK BELOW.

Where Purchased	Motor Oil	Tires	Spark Plugs	Battery	Muffler	Shocks	Oil Filter
a. Gas/Service station	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]
b. Garage/Repair shop	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]
c. New car dealer	3[ ]	3[ ]	3[ ]	3[ ]	3[ ]	3[ ]	3[ ]
d. Auto supply store*	4[ ]	4[ ]	4[ ]	4[ ]	4[ ]	4[ ]	4[ ]
e. Franchise/ Specialty Store*	5[ ]	5[ ]	5[ ]	5[ ]	5[ ]	5[ ]	5[ ]
f. Hardware store	6[ ]	6[ ]	6[ ]	6[ ]	6[ ]	6[ ]	6[ ]
g. Department store*	7[ ]	7[ ]	7[ ]	7[ ]	7[ ]	7[ ]	7[ ]
h. Tire company outlet*	8[ ]	8[ ]	8[ ]	8[ ]	8[ ]	8[ ]	8[ ]
i. All others (SPECIFY) ____________	9[ ]	9[ ]	9[ ]	9[ ]	9[ ]	9[ ]	9[ ]

IF BOUGHT NONE OF THE ABOVE SEVEN PRODUCTS, SKIP TO Q. 40)

36. Was the part installed at the place where you bought it, was it installed by yourself, by another member of your household, or by someone else? (CHECK BELOW.)

How installed	Motor Oil	Tires	Spark Plugs	Battery	Muffler	Shocks	Oil Filter
a. Where purchased	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]
b. By yourself	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]
c. By other household member	3[ ]	3[ ]	3[ ]	3[ ]	3[ ]	3[ ]	3[ ]
d. By someone else	4[ ]	4[ ]	4[ ]	4[ ]	4[ ]	4[ ]	4[ ]

ASK FOR EACH PART BOUGHT IN Q. 34

---

* Examples of: AUTO SUPPLY STORES: NAPA, Western
FRANCHISE/SPECIALTY STORES: Aamco, Meineke, Midas
DEPARTMENT STORES: K-Mart, Montgomery Ward, Sears
TIRE COMPANY OUTLETS: Firestone, Goodyear, Michelin, Uniroyal

37. Did you specify the brand you wanted when you purchased that/those (PART(S) MENTIONED)? CHECK "YES/NO" IN COLUMN BELOW. IF "NO" FOR ALL PARTS, SKIP TO Q. 40.

Specified Brand	Motor Oil	Tires	Spark Plugs	Battery	Muffler	Shocks	Oil Filter
1[ ] Yes	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]	1[ ]
2[ ] No	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]	2[ ]

38. IF BRAND SPECIFIED "YES" IN Q. 37, ASK: What brand did you specify? RECORD BELOW.

Motor Oil: ____________________

Tires: ____________________

Spark Plugs: ____________________

Battery: ____________________

Muffler: ____________________

Muffler: ____________________

Shocks: ____________________

Oil Filter: ____________________

FOR EVERYONE WHO SPECIFIED A BRAND FOR ANY OF THE SEVEN PRODUCTS IN Q. 37, ASK:

39. In general, why do you prefer the brand(s) you specified over other brands? (DO NOT READ LIST, BUT PROBE FOR REASONS: DO NOT ACCEPT "Better," ASK, "Why is it better?" PROBE: Any other reasons?

1[ ] Low price
2[ ] Convenience of outlet where purchased
3[ ] Reputation of outlet
4[ ] Past experience with brand
5[ ] Reputation of brand
6[ ] Recommendation by friend, mechanic
7[ ] Advertised specials, bargain brands, coupons
x[ ] Other (Please specify): ____________________

____

ASK EVERYONE:

40. Now I'd like to ask you about the last time you bought a tire(s) for your car(s), whenever that happened to be. About how long after you realized you needed the tire(s) did it take before you actually bought it?

1[ ] Less than 2 weeks
2[ ] 2 weeks to a month
3[ ] 1 up to 2 months
4[ ] 2 months or longer
0[ ] Never bought
y[ ] Don't remember
} SKIP TO Q. 42

41. How knowledgeable were the salespeople at the place you bought your tire(s)? Would you say they were: READ

1[ ] Very knowledgeable
2[ ] Somewhat knowledgeable
3[ ] Not at all knowledgeable
y[ ] Don't remember (VOLUNTEERED)

42. If you were going to buy tires and wanted to compare values and prices, where would you expect to find this information? (CHECK ALL SOURCES UNDER Q. 43.)

43. If you were going to buy the other replacement parts we've talked about, such as motor oil, spark plugs, batteries, etc., and wanted to compare values and prices, where would to expect to find this information? (CHECK ALL SOURCES UNDER Q. 43.)

	Tires Q. 42		Other Parts Q. 43	
Newspapers	1[ ]	→ ASK Q. 44 THEN RETURN TO Q. 43	1[ ]	-- ASK Q. 45
Magazines	2[ ]		2[ ]	
Radio	3[ ]		3[ ]	
Television	4[ ]		4[ ]	
Yellow pages	5[ ]		5[ ]	
Personal contacts (family, mechanics, etc.)	6[ ]		6[ ]	
Consumers Report/Consumers Union	7[ ]		7[ ]	
Other sources (Please specify): ______________________	x[ ]		x[ ]	
Don't know	y[ ]		y[ ]	

MENTIONED NEWSPAPER IN Q. 42 & Q. 43. OTHERS GO TO Q. 46.

44. In which section of the paper would you expect to find most advertising of tires? (READ LIST. CHECK ONE ANSWER. IF "OTHER" SECTION, ASK, "Where?" AND RECORD UNDER Q. 44. THEN RETURN TO Q. 43.)

45. In which section of the paper would you expect to find most advertising of the other replacement parts? (READ LIST. CHECK ONE ANSWER. IF "OTHER" SECTION, ASK, "Where?" AND RECORD UNDER Q.45. THEN SKIP TO Q.47.)

	Tires Q.44	Other Parts Q. 45
General news section	1[ ]	1[ ]
Business	2[ ]	2[ ]
Sports	3[ ]	3[ ]
Classified	4[ ]	4[ ]
Other section (Please specify): ______________________	5[ ]	5[ ]
Don't know/Not sure/No section in particular (VOLUNTEERED)	y[ ]	y[ ]

(RETURN TO Q. 43)

46. Do you ever look at any advertising for automotive replacement parts in your newspaper?

1[ ] Yes
2[ ] No -- SKIP TO Q. 48

47. Did you look at newspaper ads before you bought any of your last replacement parts?

1[ ] Yes
2[ ] No
y[ ] Not sure

ASK EVERYONE:

48. How many days during the last five weekdays -- that is, Monday through Friday, did you look at or read a daily newspaper?

1[ ] One
2[ ] Two
3[ ] Three
4[ ] Four
5[ ] Five
0[ ] None -- SKIP TO Q. 51

49. When was the last time you read or looked at a daily newspaper? (DO NOT READ LIST.)

1[ ] Today -- ASK Q. 50
2[ ] Yesterday
3[ ] Before that
— SKIP TO Q. 51

50. When was the last time before today?

1[ ] Yesterday
2[ ] Before that

51. Did you happen to read or look at a Sunday or weekend edition of a newspaper this past Sunday or weekend?

1[ ] Yes
2[ ] No

Now, I would like to ask you just a few questions for classification purposes, to help us analyze the data.

52. What is your age?

1	1
2	2
3	3
4	4
5	5
6	6
	7
	8
	9
	0

53. What was the last grade or class you completed in school? (DO NOT READ LIST. RECORD BELOW.)

1[ ] Some high school (11 years or less)
2[ ] High school graduate (12 years)
3[ ] Some college (1-3 years college)
4[ ] College graduate or beyond

54. Are you currently employed full-time or part-time, going to school, keeping house, or what?

1[ ] Employed full-time 2[ ] Employed part-time 3[ ] Temporarily unemployed	ASK Q. 55
4[ ] Retired 5[ ] In school 6[ ] Keeping house x[ ] Other (Please specify): ____________	SKIP TO Q. 56

55. What is your occupation? Please tell me your job title or function and the industry in which you work/

JOB TITLE: ____________________________

INDUSTRY: ____________________________

56. Are you currently:

1[ ] Married
2[ ] Divorced
3[ ] Widowed
4[ ] Separated
5[ ] Or have you never been married? (single)

57. Including yourself, how many adults age 18 or older live in your household?

1 2 3 4 5 6 7 8 9 x[ ] More than 9

58. And how many people in all -- children and adults -- live in your household?

1 2 3 4 5 6 7 8 9 x[ ] More than 9

59. In all, how many licensed drivers live in your household?

1[ ] One
2[ ] Two
3[ ] Three
4[ ] Four or more

60. Was your total family income for 1983 before taxes under $25,000 or was it $25,00 or more?

(IF UNDER $25,000, ASK):	(IF OVER $25,000 ASK):
Would that be under or over $15,000?	Would that be under or over $35,000?
1[ ] Under $15,000	3[ ] $25,000-$34,999
2[ ] $15,000-$24,999	4[ ] $35,000 or more

61. And finally, what is your relationship to the head of this household?

MEN:	WOMEN:
1[ ] Male head	1[ ] Female head
2[ ] Husband of head	2[ ] Wife of head
3[ ] Father of head	3[ ] Mother of head
4[ ] Son of head	4[ ] Daughter of head
5[ ] Other male	5[ ] Other female

1[ ] Male
2[ ] Female

CHECK DAY OF WEEK INTERVIEW WAS COMPLETED:

2[ ] Tuesday 3[ ] Wednesday 4[ ] Thursday 5[ ] Friday 6[ ]Saturday

CIRCLE NUMBER OF CALL ON WHICH THIS INTERVIEW WAS COMPLETED:

1 2 3

SPOT NUMBER: ☐☐☐

I hereby attest that this is a true and honest interview.

____

(Interviewer's Signature)

Research Report

A8600-8.21-F 2/85

Newspaper Advertising Bureau, Inc. 1180 Avenue of the Americas, New York, New York 10036

A FIELD EXPERIMENT OF THE SALES EFFECTIVENESS OF DIRECT MAIL, ROP AND INSERTS

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

January 1985

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INTRODUCTION

There are many ways for an advertiser to reach customers and potential customers. One traditional procedure has been to run ads in the pages of the daily newspaper--otherwise known as Run of Paper or ROP.

Another procedure or format is for the advertiser to have a small booklet of ads or circular printed. The circular can be inserted into the newspaper and distributed with the newspaper, hence the term, insert.

A third procedure or format is to mail out the circular by itself--direct mail.

When used by advertisers all three of these procedures have resulted in sales and, of course, there are differences in costs.

An important issue to both newspapers and advertisers is to determine which of these procedures is best--because for both newspapers and advertisers there are substantial economic consequences to the various conclusions to the question.

The problem is not a simple one.

There is the question of criterion. What is the definition of better? National advertisers are sometimes concerned about changes in customers' awareness of the brand, or in customers' attitudes toward the brand. Retailers, however, are usually more interested in sales response to advertising and usually much less interested in any of the other measures of advertising effectiveness.

It is unlikely that one procedure is very much better than either of the others since the procedure that seems more effective for some advertisers in some circumstances does not seem more effective in other circumstances or for other advertisers. It is more likely that the differences would be small.

Much consumer research has suggested that customers pay far more attention to the content of advertising--the message--than they do to the medium which brings the advertising to them. This, too, would suggest that different procedures in distributing advertising would result in small differences in the effects of that advertising.

It is likely that results will vary by different kinds of stores and different kinds of products. They are likely to vary by the differences in the amount of space used to advertise the product. They are likely to vary by the total size of the advertisement used by the advertiser to support the particular items. They are likely to vary by the total number of items in an advertisement. They are likely to vary by the creative treatment used to present the items. There is reason to think that the quality of both paper and reproduction may influence effectiveness. They are likely to vary by the number of customers into whose hands the ad falls. Some customers may respond more favorably, in general, to one form of advertising, while others may respond more favorably, in general, to another. Results are likely to be influenced by the nature and amount of competitive advertising and merchandising. There may be a "surprise" factor such that when an advertiser changes procedures, say from direct mail to ROP, or the reverse, some customers are surprised and notice more of the advertising and then some of those who are surprised buy the advertised product. In addition, there are undoubtedly other factors that also have an influence.

Since the differences between procedures or formats of advertising are likely to be small, it would be very easy to be misled, after having "tested" a new procedure. Either higher or lower sales after the test of new procedure may be due to a different product, a different group of people being reached or any of the other variables that might influence results, instead of being due to the new procedure itself. Even repeated tests may not be sufficiently rigorous, unless the additional variables are measured or held constant, to demonstrate that one procedure is better than another.

Since the differences between ad formats are likely to be small and since the issues are important, it seems necessary to do the test on a real-life basis, rather than in a laboratory. Actual ads should be run and sales counted, while holding constant as many of the variables as possible. Thus this is a field experiment.

It is rare that either advertisers or newspapers are in a position to hold constant all or even most of these influences and thus to determine which of these formats is better than another.

There is also the question of cost. More sales are only one part of the answer--the other part is the advertising cost of those sales. Sales-per-dollar of advertising costs might be a useful measure.

HOW THE STUDY WAS DONE

This is a study of the sales effectiveness of retail advertising as that advertising is run in the normal course of events. It has come about as a result of the cooperation of the Atlanta Journal and the Atlanta Constitution; the Newspaper Advertising Bureau and six Atlanta retailers: Stereo Village; Citizens Jewelers; Big Star Supermarkets; Levitz Furniture; Reeds Drugs; and Lowe's Hardware.

Interviewing for the study was carried out by Elrick and Lavidge, Inc. of Atlanta and Chicago. Tabulations were by May and Steh of Oakbrook, Illinois under the direction of Tony Webb, Supplemental Products Manager and Philip Brown, Distribution Marketing Operations Manager of the Atlanta Journal Constitution. Tony Webb also directed all the distribution of the test copies. Jamie Moore, Research Analyst, filled the role of Distribution Project Manager. Robert Rudasill, Senior Research Analyst, was the Research Project Director at the paper, under the overall supervision of Pamela Brown, Research Manager. Roy Sheppard, Manager of Retail Major Accounts at the paper worked with the retailers and supervised the work of others in that effort. Each of the retailers involved carried out their own not inconsiderable tasks. Ferguson Rood, Vice President, Advertising and Marketing at the paper, was the single person at the paper most responsible for making sure the project began, was implemented and completed. Many others at the paper made significant contributions to this complicated and difficult experiment. At the Newspaper Advertising Bureau, Leo Bogart, Executive Vice President, was responsible for initiating the project and collaborated on design with B. Stuart Tolley, Vice President, Research. Tolley directed the project at the Bureau, wrote the report and did the analysis.

A. Distributing the Advertising

The basic procedure was to distribute an ROP version of an ad in one zone of the paper; distribute an insert version of the same ad in another zone (while withholding the ROP version from that zone); mail out the insert as a direct mail piece in still a third zone (which had neither ROP version nor insert distributed in newspaper copies in that zone). In a fourth zone the insert was distributed in the newspaper and the insert was sent by mail to almost all non-subscribers[1]. This was a combination of insert plus mail. A fifth zone was used to distribute a combination of ROP and mail: the ROP version sent to subscribers and the mail sent to almost all non-subscribers. These two zones were used as examples of the newspaper's Total Market Coverage system, known as Zip. A sixth zone received none of the versions either in the paper nor in the mail: no advertising.

These zones received between about 13,000 copies of the newspaper and about 25,000 copies.

Maintaining this kind of control over both mailing and newspaper delivery, for all six advertisers, required a great deal of care and effort by those at the newspaper, including adding a symbol on the front page so that distributors would know they had the right copies for a particular zone. A special crew was used for some of the deliveries to insure the copies went where they were supposed to go. Generally speaking, about 80% of the mail sent out on Monday was delivered on Monday and the remaining 20% on Tuesday.

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[1] Apparently even with direct mail usually there are a few slipups so that fewer than 100% of all households receive the advertising. This was true here. However it seems that between 92% and 98% of the households did receive the advertising in those zones used for total market coverage or for direct mail.

In this study we used a single direct mail piece as one of the advertising formats to be tested instead of shared mail, even though shared mail costs less to the advertiser. Our problem was a practical one: finding partners for the test advertisers in the zones necessary (but withholding participation from other zones) at the times necessary. The logistics are very complicated, as will be seen later in this report. Direct mail is sent to "all" households; between 59% and 71% of the households subscribe.

The zones used for the test were chosen so that they would be matched in terms of several variables. They all have about the same level of newspaper coverage; their demographic characteristics are similar and while there are some differences in the number of households, most have around 20,000. The zones are also contiguous, which is an advantage from the point of view of distribution. They are laid out to approximate zip codes so that matching mail delivery with the newspaper routes was possible. In some cases, it was necessary to add mail carrier delivery routes from zip code areas outside the zones and to eliminate mail carrier delivery routes from other zip code areas that extended beyond the zones. Fortunately, the Atlanta Journal Constitution has the capability to tailor mail distribution in this kind of detail.

DEMOGRAPHICS/CIRCULATION COMPARISON OF ZONES

Zone	Total Pop.	Total HH's	Avg. HH Income	Home Delivered Circ.	Ratio of H.D. Circ/ Total HH's	Single Copy
I	49,816	16,345	$34,226	11,149	68.2%	2,375
II	33,012	15,530	39,361	9,749	62.8	3,450
III	52,271	21,636	34,837	15,373	71.0	4,650
IV	46,430	16,195	29,713	10,728	66.2	2,750
V	68,883	26,325	30,505	16,571	62.9	6,850
VI	89,674	31,345	25,693	18,423	58.8%	7,475

Sources: Population and Households: 1982 Population and Housing Estimates from the Atlanta Regional Commission. Average Household Income: 1980 Census of Population & Housing-Data for Year 1979. Circulation - From Report MAN 2095 (Manifest Gross Press Order by Zone for Sunday, November 20, 1983)

B. Preparing the Test Ads

The first advertiser, Stereo Village, ran their test ads on Sunday, April 15, 1984. Stereo Village had scheduled a large ROP ad extending almost completely across two full pages. The newspaper converted this ad into a four-page, black-and-one-color insert. Each page was about 10" x 10". About 68,000 copies of the insert were distributed in the test zones. The insert was not distributed anywhere else. The ROP ad ran throughout the rest of the non-test Sunday distribution of the paper. Six items were chosen as the test items, ranging from Ampex Video Tape on sale for $4.99 to a Sharp Compact Digital Disc Player on sale for $399.00. All the test items were on sale through Friday, April 20.

When the insert was produced, the intention was to display the test ads using exactly the same amount of space in both the ROP version and the insert version. Something very close to that intention was accomplished: 52 square inches were used in the ROP version for the test ads while 56 square inches were used in the insert.

The same principle was used with all the other advertisers: same amount of space to be used for the test items in both ROP and insert versions.

C. Measuring Sales

Stereo Village has four stores in Atlanta and three of those stores are in or quite close to the six test zones. Interviewers[2] were sent to those three stores beginning on Sunday the 15th through the last day of the sale, Friday the 20th. They were in those stores from 11 AM until 8 PM, Monday through Friday, and from 1 PM to 6 PM on Sunday. Each person who bought one of the test items[3] was interviewed after the sale was completed to find out his or her address. From the address it was possible to tell which test zone (if any) he or she lived in. Thus each sale could be identified as coming from either a specific one of the test zones or from an area outside the test zones.

---

[2] Elrick and Lavidge, Inc.

[3] There were a few cases where a customer asked for a test item but after looking at it and other brands in the store decided to buy another brand of the item (at either a higher or lower price). These purchases were also counted as an effect of the test advertising.

Obviously this system is not likely to identify every single sale caused by the test advertising despite our intention to do so. Some people living in the test zones may have bought the test items at the fourth store. Some purchases may have been made earlier in the mornings before interviewers arrived at the store. Some merchandise was purchased after the sale. When the store was busy, interviewers undoubtedly missed a few purchasers. Earlier research[4] has shown that, on the average, each dollar of sales caused by newspaper advertising brings with it an additional dollar of sales of non-advertised items. The customers who come to buy the advertised item stay to buy other items, but none of these sales were measured in this study.

It is inevitable that using interviewers to measure sales underestimates sales. In this particular case, the management of Stereo Village kept track, through their computer records, of all sales of the test items in those three stores. A comparison of the computer and interviewer records shows that the interviewers managed to identify 73% of the sales. For the other retailers with different products, probably smaller proportions of total sales were identified.

Although underestimated, still it was possible then to count the number of each of the test items bought by residents of each of the test zones--and, since prices were known, to count the total sales dollars that had come in from each zone for these test items.

Obviously Stereo Village had many other ad-related purchases on those days from those zones: first by those same purchasers who bought other items in the store, and second for all the other non-test items featured in the ad that ran that Sunday. The sales figures reported in this report are only for the test items (or the brands bought as a substitute for the test items).

---

[4] Double Dividend. Newspaper Advertising Bureau, Inc., 1972

D. Calculations of Costs

The basic principle used in the calculation of the costs was to begin with the advertiser's total actual costs of advertising, with all discounts, and then to pro-rate the costs down to the number of copies distributed in the test zone in question. We also pro-rated the costs from the number of pages used for the complete ad down to the space used for the test items. We end up with the costs of distributing the space used by the test items in the copies distributed in the test zones. Obviously these costs are much less than it would have cost to buy only the space used for the items and then to distribute that space only to the test zone in question, since the various rates are based on the entire circulation and the entire ad space, not just the test zone and the test item space.

Thus if the ROP version was distributed into a zone where 13,000 copies were delivered, the cost-per-thousand for the ROP (based on the lower full-run rate) was multiplied by 13. This would give the cost of distributing the entire ROP ad in that group of 13,000 households. But the test items took up only a small part of the entire ad. Some of the ad was for the store name, the logo, address and headline and that part of the space sells just as hard as the space devoted to any specific items and contributes to the sales of each item. However, only items are bought. Accordingly, the space for the test items was taken as a proportion of all the space for the items (excluding the space for the logi, headline, etc.). This proportion of the cost of the entire ad (as distributed in the 13,000 copies in the test zone) is the pro-rated cost of the space used for the test items in those test copies.

The same procedure was used with all the advertisers for the ROP parts of the test.

Inserts required a few more steps since insert costs are based on the cost of materials, the cost of printing, the cost of shipping in addition to the cost of distribution. These cost figures came from the advertisers. As with the ROP, the cost-per-thousand (obtained from the advertisers for printing and materials, and from the newspaper for the cost of distributing the copies) was multiplied by the number of thousands of copies distributed in the test zone in question. These costs were pro-rated down to the space used for the test items.

The direct mail advertising costs were calculated in essentially the same way as inserts except that the distribution costs included postage as well as handling.

In calculating these costs, each zone for an advertiser was treated separately because each zone had a different number of copies of the advertisement distributed and a different number of households. For instance, Stereo Village costs were calculated for the zone receiving the ROP version; costs for the zone receiving the insert; the direct mail and so on.

The average total cost of advertising the six test items per store in a zone was $105.64. The lowest figure was for inserts ($59.37) and the highest was for direct mail ($205.36) but, of course, the direct mail versions went to many more households than the newspaper. One of the stores paid $227.22 for the average zone (this was the highest average cost) and the lowest average cost to a store was $41.66 per zone. The differences are due to differences in size of test space used; to differences in number of copies of the most expensive procedures and differences in the costs of material and printing.

Although there was some consistency from store to store in relative costs per procedure or format, there was some variation. When one ranks the costs for each ad format used by a store and then when one compares the different stores' ranking, it turns out there are five different patterns of rankings for the six stores.

E. Materials & Timing of Other Advertisers

As with Stereo Village, the test began with the advertiser's plan for advertising. For each of the other five advertisers, the plan began with an insert which was scheduled to run in the paper. The newspaper then made up an ROP ad, using the same items as those in the insert, including, of course, the test items. Usually the insert had both more space and more items than the ROP. Original plans called for identical amounts of space for the test items but the exigencies of advertising did not always permit that. Two of the ROP ads were two-page ads; the other three were four-page ads. Three of the ROP ads used black and white; the two others used black and one color. Four of the inserts used black and three colors; the other one used black and two colors. Usually the insert advertised hundreds of items; the ROP included, on average, about half the number.

The details are listed in the chart on Advertising Materials.

Levitz preferred that their ROP ad run on Wednesday, April 25th (PM) and Thursday, April 26th (AM) and included items in the test whose costs ranged from $99 for a computer hutch to $377 for a five piece bedroom suite. The mail was delivered on Monday, April 23rd and Tuesday, April 24th. The items were on sale through Saturday, April 28th. Interviewing took place in two of Levitz' three stores from 1 PM till 9 PM on Monday through Saturday. The two stores used for the test were those in and near the test zones. Because of the nature of the product and because of the layout of the store, some special steps had to be taken to measure these sales. Those steps are described in detail in the appendix.

Big Star's Supermarket ad ran on Monday, April 30th. All of the test items were frozen foods, ranging in price from $.69¢ for broccoli spears to $1.99 for ice cream. Big Star has 49 stores in the Atlanta marketplace. The one store in the center of each zone was chosen to count sales. Interviewing took place at these stores from 10 AM to 7 PM on the Monday through Saturday that the test items were on sale.

Citizen's Jewelry is a catalog showroom retailer with six locations in Atlanta. The three stores closest to the test zones were used for interviewing from Monday, May 7th to Saturday, May 12th--eight hours a day (1 to 9 till Friday and 10 to 6 on Saturday)--when the sale prices for the test items were in effect. Prices ranged from $6.99 for an oven rack to $279.97 for a typewriter. The ROP ad was in the paper on Sunday, May 6th and the direct mail was sent out on Monday, May 7th.

Lowe's is a national retailer of building materials and supplies. Lowe's has seven stores in Atlanta. The three stores in and around the test zones were used for interviewing from Monday, May 21st through to Sunday, May 27th. Interviewers were in the stores from 10 AM to 6 PM on Monday through Friday, 9 to 5 on Saturday and 12 to 4 on Sunday. Prices on the test items ranged from $6.99 for a charcoal grill to $179.99 for an air conditioner. Lowe's requested that the ROP ad run on Wednesday (PM) May 23rd and Thursday (AM) May 24th, while the direct mail was delivered on Monday, May 21st and Tuesday, May 22nd.

Reed Drugs has 51 stores in Atlanta. Nine of those stores in and around the test zones were used for interviewing from Tuesday, July 31st to Sunday, August 5th. Interviewing was conducted from 9 to 6 on Tuesday through Saturday and from 12 to 6 on Sunday. The ROP ad ran on Sunday, July 29th and the mail pieces were delivered on Monday and Tuesday. This corresponded to the sale period for the test items, as it had for all the other advertisers. Prices ranged from $1.00 for a can of peanuts to $3.00 for a toothpaste pack.

F. Rotation of Zones

This research design means that the same creative treatment is used for all advertising formats on the same day. However, the effectiveness of one procedure or another is likely to vary from one store to another and from one product to another. Testing a range of stores and products is more valuable than testing only a few. This is one of the reasons for doing this test with six retailers rather than one--there are 33 products, not six.

The effectiveness of the procedures may also vary from one group of people to another. It is reasonable that people in one neighborhood might be more favorable, generally, to one advertising format than to another while those in a different neighborhood might be more disposed to another format. To hold this variable constant, a rotation of test zones was instituted.

The same six test zones were used with all six retailers. But each zone got a different ad procedure with each retailer. The zone used for no advertising with Stereo Village was used for direct mail for Levitz; it was used for ROP for Big Star; for the insert for Lowe's; for ROP and direct mail combined for Citizen's Jewelry and for insert and direct mail combined for Reeds. The chart below spells out the combinations for all the advertisers. This is called a Latin Square design.

As a result, the effectiveness of ROP is the average across all six retailers and across all six zones because the ROP version was used by each retailer and it was used in each zone. This means that all the people in the six zones were exposed to ROP ads; all were exposed to the insert version; all to the direct mail and so on. We are comparing sales effectiveness for the same ads, and, in the aggregate, among the same people, of the different advertising procedures.

ALLOCATION OF PROCEDURES TO TEST ZONES & ADVERTISERS

	ADVERTISERS					
Test Zones	A	B	C	D	E	F
I	ROP & Zip	Insert	Direct Mail	Insert & Zip	No Ad	ROP
II	Insert & Zip	No Ad	Insert	ROP	ROP & Zip	Direct Mail
III	ROP	ROP & Zip	No Ad	Direct Mail	Insert & Zip	Insert
IV	Direct Mail	Insert & Zip	ROP & Zip	Insert	ROP	No Ad
V	Insert	ROP	Insert & Zip	No Ad	Direct Mail	ROP & Zip
VI	No Ad	Direct Mail	ROP	ROP & Zip	Insert	Insert & Zip

Note: (1) Zip stands for the Atlanta Journal Constitution's Total Market Coverage procedure of mailing ads to non-subscribers.

(2) By using this allocation scheme, every test zone received each procedure and every advertiser used every procedure, but each household received only one version of an advertiser's message.

The test identifies those sales from each test zone for each test item and the total advertising costs in each test zone for the test items. Since each zone was used for a different procedure, the test identifies both sales and ad costs for each procedure.

Results are in terms of the dollars of sales for each procedure and dollars of sales per dollar of advertising cost, for each procedure. If there are differences among the procedures and if those differences are large enough to be seen in sales from target audiences of between 30,000 to 60,000 adults (per zone), then this test should make them clear.

G. Comparison with Other Testing Procedures

Listing all the steps of this test makes clear some of the difficulties in other tests of these ad procedures or formats. The average retailer, rather than going through these steps, is more likely to make a comparison between ROP and direct mail, for instance, by spending the same amount on advertising in ROP and direct mail. Either the retailer uses two markets with the same copy or he uses one ad one week in ROP and another ad a second week (or month) via direct mail in the same market or markets. But how do you make the dollar costs the same? If the ROP costs are lower than the direct mail, how do you increase those ROP costs to make the two the same? Either buy more newspapers or increase the amount of space per newspaper. If you increase the space, do you just use more space for the same items or do you add more items? As studies of supermarket advertising make clear,[5] increasing the size of an item from just a listing to a featured item with an illustration can make a dramatic difference in sales. On the other hand, increasing the size of an illustration by 20% may not be as useful in increasing sales as increasing the number of items by 20%. If you buy more newspapers, then you are extending your distribution farther than you felt was appropriate for your customer reach.

---

[5] Supermarket Ads Move Merchandise. NAB

There are comparable problems in distribution if the direct mail costs are lower than the ROP. Do you cut back on the newspaper costs (by cutting space or cutting items) or do you extend the mailing out beyond what you had planned?

Both of the solutions, while holding costs constant, are likely to influence the sales figures in such a way to make a reading of the results very difficult--the truth may be quite different from what even a close look at the figures would suggest.

H. Confidentiality of Results

Part of the agreement with the retailers who are participating in this study was that the results not be made public in a way which would permit individual stores to be identified. Therefore, the results are presented in a number of ways different from the usual survey research study. Sometimes the data are aggregated. Other times, when it seems necessary to refer to differences from store to store, the individual retailers are given letter codes. Less detail is provided than might be usual in a study of this sort.

ADVERTISING MATERIALS

	ADVERTISER					
	A	B	C	D	E	F
ROP	4 pg. Color	4 pg. B&W	2 pg. Color	2 pg. B&W	4 pg. B&W	2 pg. Color
Insert	16 pg. (8½x11) 4 color-heatset/ offset	8 pg. (22x13½) 4 color-coated stock	4 pg. (10½x10½) covers 1 color white stock	16 pg.(10½x13½) 4 color pages-white stock	8 pg. (13½x 21) 4 color newsprint	4 pg. (10½x13) 2 color-white stock
Total # of Items						
ROP	183	99	17	264	68	80
Insert & Direct Mail	371	351	44	340	239	64
Number of Test Items						
ROP	6	4	5	6	6	6
Insert & Direct Mail	6	4	5	6	6	6
Square Inches Used for Test Items						
ROP	52	39	38	67	140	32
Insert & Direct Mail	56	47	39	45	69	32

Note: The data are presented here in such a way as to disguise the advertisers. It is not necessarily the case that advertiser A, for example, had 371 items in the insert or had used 52 square inches for the test items in the ROP version.

RESULTS

A. SALES

One would expect a zone with 31,000 households to generate more sales than a zone with 15,000 households so we used a common measurement for all zones: sales per 10,000 households. We recognize that our measured sales are underestimates of total sales even from the test zones. We assume the underestimates are about the same from zone to zone and advertiser to advertiser. Thus it seems reasonable to look at the relative standing of one ad format vs. another.

On that basis, there is considerable variation from advertiser to advertiser, with a high (for the average zone) in measured sales or $434 of the test items to a low for another retailer (for the average zone) of $34. The average for all zones was $184 in sales of the test items per 10,000 households.

The average zone with no advertising generated $91.42 in measured sales of the test items per 10,000 households. The average zone that received the direct mail advertising generated $158.19 per 10,000 households. The average zone receiving an insert plus total market coverage generated $180.80. The average zone receiving an ROP version of the test ad generated $205.94 per 10,000 households. The average zone receiving an ROP version plus total market coverage generated $234.13 in sales of the test items per 10,000 households and the average zone receiving just the insert generated $236.04 per 10,000 households. (It might be wise to remember that each average represents all products in all zones--and, in each case, for the same people).

These figures can be put into perspective by making the lowest number equal to an index of 100 and comparing all the other numbers to that lowest number. On the average all the forms of advertising did better than the no-ad situation.[6] Direct mail did 73% better than the no-ad situation while inserts, ROP and the two total market coverage procedures did between 100% and 150% better than the no-ad zones in measured sales per 10,000 households.

Ad Procedure	Sales/10,000 Households	Index
No advertising	$ 91.42	100
Direct Mail	158.19	173
Insert	236.04	258
Insert + Total Market Coverage	180.80	198
ROP	205.94	225
ROP + Total Market Coverage	234.13	256

(Of course, none of these estimates of sales include the additional sales that newspaper advertising has been shown to generate for non-advertising items. This is another reason for paying the most attention not to the absolute levels of sales but rather to the relative differences among the ad procedures, or the index figures.)

B. ADVERTISING PRODUCTIVITY

While there are differences in terms of the sales generated by the advertising procedures, there are also differences in costs. The crucial question is: how do the different ad procedures measure up on the criterion of sales per dollar of advertising cost?

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[6] The kind of variation from retailer suggests that it might be appropriate to rank each procedure used by a retailer and then add ranks instead of adding sales dollars. That was done. The conclusion still holds that all forms of advertising did better than no advertising on the average. Details are in the Appendix.

The estimates of costs are what the retailers paid to get copies of the square inches of paper containing the test items into the households of the test zones. Just as the sales figures represent estimates of sales from the test zones of the test items only,[7] so the costs represent estimates of the advertising costs for the test items only in the test zones only.

For all zones and all retail advertisers, the average productivity was $5.77. That is, the average sales for the six items advertised in a zone divided by the cost (of the advertisement used) in that zone came out to be $5.77. That also means that for every dollar of advertising spent on these six items, the retailer got back an estimated $5.77 in direct sales of the six items.

There is considerable variation from advertiser to advertiser from a high of $20.34 to a low of $1.11. The other four retailers had returns on investment of: $3.69; $1.94; $2.36 and $5.22. These differences are undoubtedly due to differences in costs, differences in the products being sold, differences in the creativity of the advertising and differences in the proportions of total sales that were not measured.

No advertising procedure was uniformly best or uniformly worst. The table shows the number of advertisers for whom each procedure was most productive, least productive and so on.

	Direct Mail	Insert	Insert + TMC	ROP	ROP + TMC
Highest Productivity	1	1	-	3	1
Next highest	-	5	-	-	1
3rd highest	1	-	2	-	3
Next lowest	2	-	4	-	-
Lowest Productivity	2	-	-	3	1

---

[7] Because the advertising costs take into account the number of copies distributed one should use total sales, as estimated for the zone, and that has been done here. There is no need to use sales per 10,000 households.

For every dollar spent on advertising these items by direct mail, the retailers got back an estimated $2.89 in sales of those test items.[8] For inserts the measured sales per dollar of advertising cost was $7.82; for ROP it was $8.35. For inserts plus total market coverage, the return was $5.52 while for ROP plus total market coverage, the retailers averaged $4.31 of sales per dollar of advertising cost.

These figures could be put into a simpler perspective by considering the return on direct mail to be 100 and indexing all the others against this figure. Here, too, the index figures are more important than the measured sales dollars.

Ad Procedure	Sales Dollars Per Advertising Dollar	Index
Direct Mail	$2.89	100
Insert	7.82	271
Insert + Total Market Coverage	5.52	191
ROP	8.35	289
ROP + Total Market Coverage	4.31	149

These figures show that both inserts and ROP have productivity of more than two and a half times the productivity of direct mail--for these products for these advertisers at these costs in this market at this time. Both of the Total Market Coverage products did substantially better than direct mail (49% better or almost half again as well and 91% better or almost twice as well).

---

[8] As mentioned earlier, we did not use shared mail as one of the advertising formats. However one may estimate the likely range within which the savings on postage would fall. By using shared mail the advertiser's mail costs drop substantially but his printing, shipping and materials costs remain the same. Thus total costs don't drop as much as the drop in postage. We estimate that, for the six mailing pieces used in the test, the drop in total costs would probably have been between one fifth and three fifths. There would have been a corresponding rise in productivity if we assume that each circular in a shared mailing is just as effective as it would be if it were mailed by itself. That is unlikely. Thus the productivity probably would not have gone up as much as the costs went down.

APPENDIX

A. Sales per 10,000 Households - Ranking Results

B. Sales Productivity - Ranking Results

C. Sales Above the No Ad Procedure

D. Measurement of Sales at Levitz

A. Sales per 10,000 Households -- Ranking Results

To measure the efficiency of situations in which there is considerable variation from retailer to retailer, it is sometimes appropriate to use ranks instead of the actual sales figures since the totals in measured sales figures might be influenced greatly by one or two retailers with high sales figures for some ad procedures. Using ranks eliminates that problem since each retailer is then equal to each other retailer.

The disadvantages of using ranking is that they completely ignore large differences between two ad procedures used by the same retailer. With rankings, a large difference is given the same weight as a small difference.

In the section of the results dealing with sales per 10,000 households, the use of ranks leads to the same general conclusion: that advertising has a positive effect on sales above the level with no advertising. Where a ranking of 1 was assigned to the zone of a retailer with the highest sales per 10,000 households and 6 was assigned to the zone with the lowest sales, the average rank of the no ad zone (in sales per 10,000 households) was 5.08. That was the lowest average rank. For three of the retailers, the no ad zone had the lowest level of sales; for another the no ad zone was tied with another ad procedure's zone for the lowest sales. For the other two retailers, the no ad zone had the third and fourth lowest sales figures per 10,000 households.

The ad procedure with the highest average rank was ROP plus total market coverage--2.17. For two of the retailers, it has the highest sales per 10,000 households; for one retailer it had the lowest. This ad procedure was second highest when considered from the point of view of absolute sales figures (with an index of 256 compared to the insert ad procedure that had an index of 258).

The ad procedure with the second highest average rank (3.0) was inserts. It was first for one advertiser.

The ad procedure that is fourth best via the ranking procedure is also fourth via the absolute sales figures per 10,000 households: inserts plus total market coverage.

The remaining two procedures reversed their positions: ROP had the third highest sales based on the absolute figures (with an index of 225) but it is fifth based on ranks while direct mail was fifth (after no advertising) based on absolute sales figures (index of 173) and third based on ranks.

Ad Procedure	Average Rank	Indices of Sales Results Without Regard to Advertising Costs
Inserts	3.00	258
ROP + Total Market Coverage	2.17	256
ROP	3.92	225
Inserts + Total Market Coverage	3.67	198
Direct Mail	3.17	173
No Ad	5.08	100

B. Sales Productivity -- Ranking Results

The same ranking procedure can also be used with the sales productivity data. Direct mail and inserts plus total market coverage are tied for the lowest productivity using the ranks; inserts are first; ROP plus total market coverage is second, with ROP alone close behind. The ROP version was most productive for three advertisers and least productive for the other three; inserts were most productive for one advertiser and second most productive for all the others; direct mail was most productive for one advertiser but least productive for two others.

Ad Procedure	Average Rank	Indices Relative to Advertising Costs
ROP	3.00	289
Inserts	1.83	271
Inserts plus Total Market Coverage	3.67	191
ROP plus Total Market Coverage	2.83	149
Direct Mail	3.67	100

C. Productivity in Incremental Sales Above the Level of No Advertising

We can also estimate the measured sales results achieved by various forms of advertising above and beyond the level of sales in the no-advertising situation. This approach also shows a large spread in efficiency between mail and the various forms of newspaper advertising. The indices of relative productivity change as we change the base from the total measured sales to incremental sales. Again we looked at the measured sales return from each advertising procedure which, as has already been pointed out, is only a portion of the actual full return. We subtracted the proportionate sales due to the average no-ad condition. Applying the appropriate advertising costs we obtain the added estimated sales return per ad dollar, which is also indexed in the right column. It must be remembered that all the figures below are projected estimates and a step away from the measured sales and ad costs used in the preceding part of this analysis.

Ad Procedure	Extra Estimated Sales $/Ad $	Indices
Inserts	$5.98	442
ROP	4.64	344
Inserts + Total Market Cov.	3.18	236
ROP + Total Market Coverage	2.73	206
Direct Mail	1.35	100

D. Measurement of Sales at Levitz

With big ticket items like furniture and with salespeople on a commission basis, no salesperson wants to have an interviewer around while he or she is trying to make a sale. Furthermore, the Levitz stores are warehouse stores in which customers sometimes just wander around. Salespeople provide help, write up orders and direct the customers to the central cashier's office. Accordingly, the interviewers were located near the central cashier's office and notified when sales had been made. Each salesperson was given a dollar for every purchaser (of one of the test items) that he or she delivered to the interviewers.

Levitz
74th anniversary SALE
EVERYTHING IN STOCK IS ON SALE!
$299
LOWES
MEMORIAL DAY SALE
Citizens
25% OFF
60% OFF SALE!
REED
dollar days
$1
Big Star Consumer Price Finder
49¢

A8C00-8.22-U

Research Report

[redacted]

Newspaper Advertising Bureau, Inc. 1180 Avenue of the Americas, New York, New York 10036

Key Facts About

Newspaper and Advertising

1985

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers. These reports are designed to promote the efficient use of the newspaper medium for the advertising and marketing needs of individual companies.

March 1985

© Newspaper Advertising Bureau, Inc.

How To Use "Key Facts"

The main purpose of this report compiled from many sources is to answer some of the most frequently asked questions about newspapers and advertising.

The report is designed mainly as a reference source, not as an account to be read through page by page. To maximize its reference value the table of contents organizes specific items of information under a few broad headings such as "Advertising Cost" and "Newspaper Circulation."

For example, if one needs information on daily newspaper reach and frequency, this comes under the general heading of "Newspaper Readership," where it is listed as "Reach and Frequency: Typical Five-Day Patterns for Daily Newspapers at Varying Levels of Penetration."

The scope of the material is necessarily limited. For answers to other questions about newspapers and advertising, consult the heading "NAB Telephone Directory."

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NAB Telephone Directory

Ad readership	Stu Tolley	704-4562
Advertising expenditures	Jim Conaghan	704-4558
Advertising rates	Jim Conaghan	704-4558
Automotive sales	Val Corradi	(313) 642-9200
CAN DO	Susan Lorenzana	704-4555
Color (ROP)	Charles Kinsolving	704-4544
Co-op sales (NCN)	Frank Hennessey	(312) 644-1290
Coupon information	John Kelley	704-4557
Food supermarkets	Dick Neale	704-4540
Information center	Ann Brady, Susan Hyer	704-4549
Inserts, preprints	Jack Aldinger, Ted Knecht	704-4520/1
Intermedia cost estimates	Ed Finlay	704-4552
Marketing services	Uldis Grava	704-4550
Membership information	Bill Solch	704-4530
National sales	Mac Morris	704-4503
Newspaper circulation	Jim Conaghan	704-4558
Newspaper features/sections	John Kelley	704-4557
Newspaper readership	Chuck Lehman	704-4564
NEWSPLAN	Mac Morris	704-4503
New technology	Charles Kinsolving	704-4544
One Order/One Bill	Jack Aldinger, Ted Knecht	704-4520/1
Public relations	Jim Dunaway	704-4547
Real estate classified	Tony Marsella	704-4516
Recruitment advertising	Ira Gordon	704-4515
Retailing	Alfred Eisenpreis	704-4535
SAU TM (Standard Adv. Units)	Charles Kinsolving	704-4544
SMRB (Simmons) data	Chuck Lehman	704-4564
Standard panels	Tom Fitzpatrick	704-4551
Survey research	Chuck Lehman	704-4564
Total market coverage	Jack Aldinger	704-4521

(Unless otherwise stated, area code is 212)

New York Office	(212) 921-5080
Chicago Office	(312) 644-1290
Detroit Office	(313) 642-9200
Georgia Office	(404) 949-4833
Los Angeles Office	(213) 480-0452
San Francisco Office	(415) 981-8118

NEWSPLAN; Discounts for Continuity

ONE PROGRAM:

NEWSPLAN's only purpose is to make national and regional advertising more effective by giving it the believability, immediacy and selling impact of ROP newspaper advertising at lower cost and greater convenience.

THREE BENEFITS:

Discounts--Lower cost for the advertiser

By planning ahead, you can earn discounts from 10 to 30% or more with NEWSPLAN. Plan your advertising on an annual basis to make sure your cumulative space--in column inches or modular units--equals 6 pages, 13 pages, 26 pages or 52 pages. Discounts at these page levels are now in effect in over 1,000 newspapers representing 82% of total U.S. circulation.

SAUs™ - Simplified specs for the creative department

Thanks to Standard Advertising Units accepted by 1,594 daily newspapers (98% of total circulation) one finished mechanical now covers all the newspapers in your schedule in most cases. (See pages 4, 5 and 6 for more details.)

CAN DO--Better audience data for marketers and planners

CAN DO gives you net reach and frequency data for any daily or Sunday newspaper schedule and any geographic area, down to the county level. Audience figures can be run by sex, age, household income or household size. CAN DO computer runs are available through your own terminal if you are an IMS subscriber or through NAB at cost.

For more information on NEWSPLAN, call Mac Morris at (212) 704-4503.

CAN DO

The Newspaper Advertising Bureau's CAN DO program can:

- produce detailed audience data for any list of newspapers
- provide data customized to any geographic or demographic definition
- calculate reach and frequency estimates
- allow media mix analyses through IMS data bases for other media
- deliver data output via an on-line computer system

CAN DO data are available for every daily and Sunday newspaper in the United States.

CAN DO uses county building blocks to estimate audiences for all MSAs, ADIs, DMAs or customized areas constructed on whole county lines. And CAN DO provides estimates for the most important audience breaks--age, sex, income and household size.

If you wish to provide us with the total cost per insertion, CAN DO will give you specific cost-per-thousand information on your newspaper audience.

For further information contact Susan Lorenzana (212) 704-4555

Standard Advertising Units (SAUs)™

The Standard Advertising Unit system simplifies the production and placement of newspaper advertising. The expanded SAU™ system introduced on July 1, 1984 has received the endorsement of AAAA, ANPA, INAME, NAB and other organizations. Newspapers accepting SAUs represent 98% of total U.S. daily circulation.

Broadsheet newspapers in full compliance with the system have a 6-column format for display advertising, a 13-inch printed page and a standard column width of 2 1/16 inches. Measurement and billing of advertising is based on the standard column inch. Most tabloids have adopted a 5-column format with the same column width as broadsheets. (The expanded SAU™ format chart on page 5 depicts 53 of the 57 advertising sizes developed. These include the N size for short cut-off tabloids. The remaining four sizes are all double truck as noted on the page.)

For more information or a full-scale SAU™ format chart, call Charles Kinsolving at (212) 704-4544.

(Effective July 1, 1984)

The Expanded SAU™ Standard Advertising Unit System

Depth in Inches	1 COL. 2-1/16"	2 COL. 4-1/4"	3 COL. 6-7/16"	4 COL. 8-5/8"	5 COL. 10-13/16	6 COL. 13
FD*	1xFD*	2xFD*	3xFD*	4xFD*	5xFD*	6xFD*
18"	1x18	2x18	3x18	4x18	5x18	6x18
15.75"	1x15.75	2x15.75	3x15.75	4x15.75	5x15.75	
14"	1x14	2x14	3x14	4x14	N 5x14	6x14
13"	1x13	2x13	3x13	4x13	5x13	
10.5"	1x10.5	2x10.5	3x10.5	4x10.5	5x10.5	6x10.5
7"	1x7	2x7	3x7	4x7	5x7	6x7
5.25"	1x5.25	2x5.25	3x5.25	4x5.25		
3.5"	1x3.5	2x3.5				
3"	1x3	2x3				
2"	1x2	2x2				
1.5"	1x1.5					
1"	1x1					

13"

1 Column 2-1/16"
2 Columns 4¼"
3 Columns 6-7/16"
4 Columns 8⅝"
5 Columns 10-13/16"
6 Columns 13"

Double Truck 26¾"
(There are four suggested double truck sizes:)

13xFD*	13x18
13x14	13x10.5

*FD (Full Depth) can be 21" or deeper. Depths for each broadsheet newspaper are indicated in the Standard Rate and Data Service. All broadsheet newspapers can accept 21" ads, and may float them if their depth is greater than 21".

Tabloids: Size 5 x 14 is a full page tabloid for long cut off papers. Mid cut off papers can handle this size with minimal reduction. The N size, measuring 9⅜ x 14, represents the full page size for tabloids such as the New York Daily News and Newsday and other short cut off newspapers. The five 13 inch deep sizes are for tabloids printed on 56 inch wide presses such as the Philadelphia News. See individual SRDS listings for tabloid sections of broadsheet newspapers.

Newspaper Advertising Bureau, Inc.
485 Lexington Avenue New York, New York 10017 (212) 557-1800

[illegible]

Fractional Broadsheet Pages: Column Inch Equivalents, With Standard Advertising Unit^{TM} Options

Full page = 126 column inches

6 x 21 (FD)

Two-thirds page = 84 column inches

4 x 21 (FD)
6 x 14

Half page = 63 column inches

3 x 21 (FD)
4 x 15.75
6 x 10.5

One-third page = 42 column inches

2 x 21 (FD)
3 x 14
4 x 10.5
6 x 7

Quarter page = 31.5 column inches

2 x 15.75
3 x 10.5

One-sixth page = 21 column inches

1 x 21 (FD)
2 x 10.5
3 x 7
4 x 5.25

One-eighth page = 15.75 column inches

1 x 15.75
3 x 5.25

NAB Services: New Technology and Color

The oldest advertising medium in the United States is actually one of the most advanced in technological applications. Newspapers have launched a variety of electronic information services. Computerization and satellites have transformed every aspect of newspaper production. And electronic pressroom equipment is revolutionizing run-of-paper color reproduction.

NAB's Marketing/New Technology Department works closely with the Technical Committee of the ANPA, the 4A's and other organizations to track key developments in the new technologies, and their implications for the newspaper business. To keep members abreast of new developments, the department holds seminars, publishes a monthly newsletter, conducts research, and issues reports.

The Marketing/New Technology Department also maintains close contact with advertisers, agencies and newspapers regarding the application of new technologies to make newspapers a more attractive, more economical, and easier-to-buy medium.

Particular areas of interest of the department include:

SAU^{TM} implementation
Satellite transmission (AD/SAT)
ROP color
Electronic information services
Personal computer market
Cable TV

For more information on Marketing/New Technology Department activities, call Charles Kinsolving at (212) 704-4544.

ROP Color: Availability and Premiums

The great majority of newspapers offer ROP color advertising. In the 314 MSA markets, SAU^{TM} quarter-page ads in BW&1C can reach 68% of the total weekday circulation. Full-page ads in BW&3C can reach 89% of the total circulation.

Cumulative Percent of Total Circulation Represented by Daily Newspapers Offering ROP Color[a]

	Accept SAU Quarter-Page Ad			Accept SAU Full-Page Ad		
	One Color	Two Colors	Full Color	One Color	Two Colors	Full Color
Top 50 MSAs	58.8%	50.9%	49.2%	91.4%	86.1%	83.1%
Top 75 MSAs	60.7	52.5	50.6	92.7	87.5	84.7
Top 100 MSAs	62.3	53.8	52.0	93.4	88.5	85.9
Top 200 MSAs	66.5	59.3	57.8	94.5	90.4	88.2
All 314 MSAs	68.2	61.6	60.2	95.0	91.2	89.2

a) All daily newspapers with at least .05 ratio of circulation to households, or more than 25,000 circulation in the MSA.

Percent Color Premium Above Black and White Cost for Newspapers Offering ROP Color

	SAU Quarter Page			SAU Full Page		
MSA Rank	One Color	Two Colors	Full Color	One Color	Two Colors	Full Color
1 - 100	41%	55%	65%	12%	17%	20%
101 - 300	47%	68%	85%	13%	18%	22%
201 - 314	47%	71%	94%	12%	18%	24%
Total 314	43%	60%	74%	12%	17%	21%

Sources: ANM Circulation '83/'84; SRDS, July 1984. Prepared by Newspaper Advertising Bureau.

NAB's One-Order/One-Bill Newspaper Placement Service

This service is set up to provide advertisers and agencies with all the information needed to plan and execute any type of multi-newspaper ROP or insert program, including costs, specifications and availabilities. For estimates and information, call Jack Aldinger or Ted Knecht at (212) 704-4520/21. They will handle all paper work, make reservations, issue insertion orders, provide proof-of-performance tearsheets and forward payment to every newspaper on the schedule, billing you on one invoice. Feel free to use this valuable service.

Free-Standing Insert Options

Today inserts can be distributed in nearly every daily and Sunday newspaper in the United States. Circulation achieved is more than 59,000,000 daily and 56,000,000 Sunday. Over 50% of all Sunday editions can distribute an insert in less than their full-run circulation, and more than 75% will accept a product sample attached to an insert. A similar proportion will accept an envelope, either empty or containing inserts or coupons.

Sizes are almost limitless. You can make an insert as large as anything that fits into the newspaper when folded, to 11" x 13", or as small as 5" x 7". Formats are equally varied: from a single page to a booklet of 96 pages or more. Inserts can be long or short and can include flaps, gatefolds, reply cards, coupons, perforations, fragrances, etc. Inserts can be printed on all types of paper from ordinary newsprint to super-coated card stock.

Newspaper Co-op Network (NCN)

With just one call to Newspaper Co-op Network, manufacturers and advertising agencies can easily place dealer listing co-op ads in any number of markets. Through NCN, you can coordinate your local message with your national brand awareness advertising--and still include local dealer listings in each market. You place only one order and get one bill--NCN DOES ALL THE WORK!

NCN is a total marketing package that dramatically increases vertical movement. Here are ten of NCN's unique advantages:

FACT 1 One Order/One Bill makes newspapers easy to use for co-op and eliminates the hassle of multiple orders and invoices.

FACT 2 NCN is cost efficient--It eliminates administration costs and insures the best possible rates available for dealer list co-op advertising.

FACT 3 Stimulates local retailer involvement and produces new retail single-signature advertising.

FACT 4 Flexibility--Tailors newspaper coverage to your needs for any combination of regular or test markets.

FACT 5 Creative Control--Advertiser controls both graphics and content.

FACT 6 Guaranteed Timing--Direct placement when and where you want it.

FACT 7 Localized Monitoring--Provides a new measurement tool. National Sales Manager now evaluates local market dealer penetration.

FACT 8 Customization--Dovetails ad coverage with local representatives' sales areas or distributor/wholesaler territories.

FACT 9 Specialization--Trouble-shooting capability to solve immediate marketing problems, i.e., excess inventory, new product test and competitive threat, market by market.

FACT 10 Free Sales Help!--NCN's newspaper co-op managers act as an extension of your own sales force. (Newspapers have more than 26,000 retail sales people in the field.)

Best of all, NCN WORKS. Ask us for success stories. For more information on NCN, call Frank Hennessey at (312) 644-1295.

Where to Obtain Rate Information

Current information on ROP rates for daily and Sunday/weekend newspapers is available from the Media Analysis Unit of NAB. Contact Jim Conaghan at (212) 704-4558.

Through NAB's NEWSPLAN, over 1,000 newspapers with more than 82% of total weekday circulation offer discounts to national and regional advertisers who place ROP column inches or modular units equal to six or more pages per year. For more information, contact Mac Morris at (212) 704-4503.

Current information on rates for preprints and inserts is available from Jack Aldinger at (212) 704-4521 or Ted Knecht at 704-4520.

Among the Media Analysis Unit reports that include rate information are the following:

MSA METROPOLITAN MARKETS BY HOUSEHOLDS (314 MSAs)

United States Markets ranked by number of households in MSA. Lists all newspapers with at least .05 ratio of circulation to households or more than 25,000 circulation. Includes circulation-to-household ratios; metro and total circulation; inch rates; and cost of SAU quarter page, half page and full page. Published separately for weekday and Sunday/weekend editions.

ADI MARKETS BY HOUSEHOLDS (209 ADIs)

Comparable information, ranked by number of households in Area of Dominant Influence rather than Metropolitan Statistical Area.

CUMULATIVE CIRCULATION AND RATES OF DAILY NEWSPAPERS IN 314 MSAs NECESSARY TO OBTAIN 60% HOUSEHOLD COVERAGE IN EACH MARKET.

(For complete list of annual reports prepared by Economic and Media Analysis Unit of NAB, see page 36.)

How Can Intermedia Advertising Costs Be Estimated?

Media planners often need to compare the cost of various advertising media. The best approach to the problem is to use common universe standards as a media base. The Designated Market Area* (DMA) is a geographic unit that lends itself to this purpose, since the 205 DMAs account for the total land area of the United States.

Intermedia cost estimates can be expressed in terms of households or standard demographic age/sex cells because current figures are available for both broadcast and newspapers

Since major advertisers and agencies are usually concerned with advertising schedules rather than single insertions, the logical measure of potential exposure is Gross Rating Points (GRPs).

The table on page 33 illustrates how GRPs can be used for intermedia comparisons, in this case between TV and newspapers. This table shows marginal differences in the household universes for newspapers and TV because Nielsen household estimates are 98% of 1985 forecasts (year ahead) whereas newspaper DMAs are 100% of Market Statistics 1984 updates (year past) of the 1980 census.

The table on page 13 compares the cost-per-household GRP of the quarter-page newspaper space unit (31.5 column inches) and TV time unit (30 seconds) most favored by national advertisers. For TV, the daypart used is prime time because this is the period offering the largest dual audience.

The figures shown represent a conservative estimate at national open rates, used in the initial stages of setting up a media plan. A final plan specifying particular TV programs and individual newspapers (with local or earned volume discounts) would show better efficiencies in cost-per-thousand audience delivery.

For further details contact Ed Finlay (212) 704-4552.

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* This statement applies to the Area of Dominant Influence (ADI) as well.

Newspaper vs. Television: Top 20 Markets
Household and Cost/HH GRP Comparison
(Oct-Dec 1984)

	30 sec. Primetime Spot TV		31.5 inches Daily Newspapers	
DMA Market	HH (000)	Cost/HH GRP	HH (000)	Cost/HH GRP
1. New York	6,578	$ 630	6,621	$ 575
2. Los Angeles	4,432	607	4,411	320
3. Chicago	3,007	326	3,006	272
4. Philadelphia	2,470	211	2,452	217
5. San Francisco	2,068	306	2,059	208
6. Boston	1,933	316	1,972	185
7. Detroit	1,636	190	1,669	180
8. Washington, DC	1,518	195	1,520	157
9. Dallas-Ft. Worth	1,511	272	1,437	162
10. Cleveland	1,426	122	1,423	132
TOTAL: Top 10	26,579	$ 3,175	26,570	$2,408
11. Houston	1,410	$ 246	1,362	$ 119
12. Pittsburgh	1,217	134	1,221	128
13. Miami	1,145	211	1,148	134
14. Minneapolis-St. Paul	1,139	143	1,135	91
15. Atlanta	1,138	168	1,111	111
16. Seattle-Tacoma	1,131	150	1,138	92
17. Tampa-St. Petersburg	1,112	141	1,086	89
18. St. Louis	1,049	101	1,054	105
19. Denver	961	153	919	76
20. Sacramento	903	100	911	95
TOTAL: Top 20	37,784	$4,722	37,655	$3,448

Sources: Media Market Guide, 4th Qtr. 1984; DMA Planner, Fall 1984

How Newspaper Advertising Works

The daily newspaper is a unique advertising medium. Readers think of the newspaper mainly as a useful source of information. They are aware of the difference between editorial content and advertising, but in their everyday use of the newspaper they don't pay much attention to this distinction. The most common way of reading the paper is to start with the front page and go through the paper page by page, scanning it for articles and ads that look "interesting."

Individual readers find different kinds of content "interesting," and the human eye's efficiency as a scanning device makes it easy for readers to find the articles and ads they want to read. As a result, interest in newspaper ads is highly correlated with buying interest:

Average Interest Level in 339 Newspaper Ads, by Prospect Status

Prospects:	Interest in Ad
I ("hottest" prospects)	90%
II	78
III	48
Non-prospects:	
IV	48%
V	33
VI ("coldest" non-prospects)	11

(For further details, see "How Newspaper Ads Select Customers," Newspaper Advertising Bureau, Inc., 1979.)

This close link between prospect status and interest in advertising may seem self-evident, but it does not necessarily hold for other media in which advertisers depend on novelty, humor or the personality of the presenter to attract the consumer's attention.

A Few Common Newspaper Terms

Broadsheet:	A "standard" or large-size newspaper. As of July 1, 1984, most broadsheet dailies adopted a uniform 13-inch printed page width and a full depth of 21" or deeper, up to 22-1/2".
Circulation:	The number of copies sold or distributed. For the more than 90% of weekday circulation audited by the Audit Bureau of Circulation, the term always denotes paid circulation.
Color scanner:	Electronic equipment that automatically produces separations for ROP process (or "full") color.
Column inch:	Space measurement one column wide and one inch deep. (See "Standard Advertising Units", pp 4,5.)
Double truck:	Two facing pages used for a single unbroken advertisement. Also called a two-page spread.
Facsimile transmission:	The electronic transmission of a page image (usually to printing plants at other sites).
Front-end system:	A total computer system for text entry, editing, formatting and/or billing, for editorial, display advertising and/or classified advertising.
Newsprint:	The uncoated, machine-finished paper on which newspapers are printed.
Pagination system:	A computerized makeup system for composing whole pages of type, line art and halftones.
Press run:	Total number of copies printed per issue.
ROP:	ROP (or "run-of-paper") is a term generally applied to ads that appear on a newspaper page (as distinguished from preprints or inserts).
Scotch double truck:	A single unbroken advertisement on two facing pages bordered by one full column of editorial on each of its vertical sides and by shallow columns of editorial across the top.
Tabloid:	A newspaper with a smaller page size than a broadsheet. A full tabloid page is usually 14 inches deep. The width varies from 9-3/8" ("short cut-off") to 10-13/16" ("long cut-off").

Daily Newspaper Audience
(Average Weekday)

	Number (in 000s)	Percent of Population (Coverage)	Percent of Audience (Composition)
Total Adults	110,764	66%	100%
By Sex:			
Men	53,521	68%	48%
Women	57,243	65	52
By Age:			
18-24 years	16,834	59%	15%
25-34 years	24,062	61	22
35-44 years	20,133	69	18
45-54 years	16,346	73	15
55-64 years	16,419	74	15
65 years or older	16,970	65	15
By Education:			
College graduate	22,152	79%	20%
1-3 years college	20,977	72	19
High school graduate	44,213	68	40
Some high school or less	23,422	52	21
By Household Income:			
$50,000 or more	14,016	81%	13%
$40,000 or more	26,099	79	24
$30,000 or more	45,329	76	41
$25,000 or more	57,003	75	51
$20,000 - $24,999	13,047	70	12
$15,000 - $19,999	11,102	65	10
$10,000 - $14,999	14,402	59	13
Under $10,000	15,210	49	14
By Occupation:			
Professional, manager	20,238	78%	18%
Technical, clerical, sales	21,981	71	20
Precision, craft	8,076	64	7
Other employed	18,768	60	17
Not employed	41,701	62	38

Source: SMRB, 1984 Study of Media & Markets

NOTE: These figures include readership of national newspapers. Data in the standard SMRB, 1984 SMM volumes refer only to local daily newspapers.

Sunday/Weekend Newspaper Audience
(Average Sunday/Weekend)

	Number (in 000s)	Percent of Population (Coverage)	Percent of Audience (Composition)
Total Adults	109,661	65%	100%
By Sex:			
Men	51,929	66%	48%
Women	57,732	65	52
By Age:			
18-24 years	18,104	64%	17%
25-34 years	25,312	64	23
35-44 years	20,089	69	18
45-54 years	15,656	70	14
55-64 years	15,501	70	14
65 years or older	14,999	58	14
By Education:			
College graduate	22,612	80%	21%
1-3 years college	21,013	73	19
High school graduate	43,755	66	40
Some high school or less	22,282	49	20
By Household Income:			
$50,000 or more	14,369	83%	13%
$40,000 or more	27,231	82	25
$30,000 or more	47,093	79	43
$25,000 or more	58,800	77	54
$20,000 - $24,999	12,534	67	11
$15,000 - $19,999	10,623	62	10
$10,000 - $14,999	13,474	55	12
Under $10,000	14,231	46	13
By Occupation:			
Professional, manager	20,352	79%	19%
Technical, clerical, sales	22,749	74	21
Precision, craft	8,117	64	7
Other employed	31,031	58	16
Not employed	40,355	60	37

Source: SMRB, 1984 Study of Media & Markets

Local Market Newspaper Audience Data

Through its CAN DO program, Newspaper Advertising Bureau supplies audience estimates at cost for any combination of daily and Sunday newspapers. Classifications available include age, sex, household size and income. For information contact Susan Lorenzana at (212) 704-4555.

Advertisers who need local audience data for other standard demographic classifications can often get this information by contacting newspapers directly.

The following list is a sample of research companies that conduct syndicated multi-market newspaper research or individual market studies of readership or reader attitudes.

Newspaper Advertising Bureau does not endorse any specific companies or comment on their professional qualifications. The presence of a particular company name on this list should not be taken as an endorsement, nor the absence of some other name as evidence of disapproval. This is merely a sample of companies conducting newspaper research. For a more complete list of research companies, see the American Marketing Association GreenBook.

Syndicated Multi-Market Studies

Company Name:	No. of Mkts.	Contact:	Telephone:
Mediamark Research	10	Alain Tessier	(212) 599-0444
Simmons-Scarborough	56	John Polich	(212) 685-2225

Individual Newspaper Studies

Company Name:	Contact:	Telephone:
Belden Associates	Deanne Termini	(214) 522-8630
Brehl & Associates	Mary Toppmeyer	(516) 466-6882
Creative Research Services	William Ash	(212) 962-6150
Market Opinion Research	Frederick Currier	(313) 963-2414
MORI Research	Kristen McGrath	(612) 881-2380
Omni-American	John Brodbeck	(305) 746-3335
Response Analysis Corp.	Diane Schrayer	(609) 921-3333
RMH Research	Richard Hochhauser	(201) 797-9600
Senft Research Associates	Henry Senft	(516) 944-6888

Reach and Frequency: Typical Five-Day Patterns for Daily Newspapers at Varying Levels of Penetration

One Issue Reach:		Number of Weekday Issues: Two	Three	Four	Five
15%	Reach	19%	22%	23%	25%
	Avg. Freq.	1.6	2.1	2.6	3.1
20%	Reach	26%	29%	31%	33%
	Avg. Freq.	1.6	2.1	2.6	3.1
25%	Reach	32%	36%	39%	41%
	Avg. Freq.	1.6	2.1	2.6	3.1
30%	Reach	38%	43%	46%	48%
	Avg. Freq.	1.6	2.1	2.6	3.1
35%	Reach	45%	50%	54%	56%
	Avg. Freq.	1.6	2.1	2.6	3.1
40%	Reach	51%	57%	61%	64%
	Avg. Freq.	1.6	2.1	2.6	3.1
45%	Reach	58%	64%	68%	71%
	Avg. Freq.	1.6	2.1	2.6	3.2
50%	Reach	64%	71%	75%	78%
	Avg. Freq.	1.6	2.1	2.7	3.2
55%	Reach	70%	78%	82%	85%
	Avg. Freq.	1.6	2.1	2.7	3.2
60%	Reach	77%	84%	88%	91%
	Avg. Freq.	1.6	2.1	2.7	3.3

Note: These estimates assume a turnover rate of 28%, which is average for metropolitan newspapers. Turnover rates, the ratio of the two-issue reach to the one-issue reach, range from about 16% to 36%. Since the reach and frequency patterns for individual newspaper vary, these estimates should be used only in the absence of local data.

Source: Audits and Surveys, Inc.;
Newspaper Advertising Bureau

Editorial Environment; Newspaper Sections and Features

The newspaper provides varied editorial environments that meet the needs of almost any advertiser. On request, more than eight out of ten U.S. newspapers will position advertising near appropriate content, usually without charge.

A 1983 survey of newspapers enables NAB to supply a computerized list of newspapers that regularly carry a specific section or feature. This list, alphabetized by state and by city within state, tells which days of the week the section or feature runs, as well as the newspaper's general policy on positioning.

SECTIONS on which information is available include:

Business, finance
Entertainment
Fashion
Food
Home
Lifestyle, women
Science
Sports
TV, radio
Travel

FEATURES (partial listing):

Advice on personal finance
Astrology
Automotive
Beauty
Best food buys

Books
Business, financial
Career advice
Child care
College

Computers (personal)
Diet, nutrition
Fashion, men
Fashion, women

Fashion, teenage
Games and puzzles
Gardening
Health and medical
Home building, repair

Home furnishings
Movie timetable
Music, records, tapes
Op Ed page
Outdoors: camping, etc.

Personal advice
Pets
Photography
Real estate

Recipes
Religion
Restaurants
Retirement, Social Security

Science, technology
Sewing patterns
Sports (spectator)
Sports (participant)
Stamps, coins

Theatre
Travel and resort
Weather map
Wine

For information, call John Kelley at (212) 704-4557.

Number of Daily and Sunday Newspapers in the United States

Year	Morning	Evening	All Day	Total Daily	Sunday
1981	379	1,323	30	1,732	755
1982	401	1,277	33	1,711	768
1983	417	1,255	29	1,701	772

Circulation of Daily and Sunday Newspapers in the United States

(in 000's)

Year	Morning[1]	Evening[1]	Total Daily[1]	Sunday
1981	30,552	30,878	61,431	55,180
1982	33,174	29,313	62,487	56,260
1983	33,842	28,802	62,644	56,747

[1] Circulation of all-day newspapers is apportioned between "Morning" and "Evening."

1983 Newspaper Data for Canada

	Morning[1]	Evening[1]	Total Daily[1]	Sunday/ Weekend
Number of newspapers	26	92	115	34
Circulation (in 000's)	2,489	2,772	5,261	4,804

[1] Three all-day newspapers counted both in AM & PM columns, but only once in the total. Circulation for these papers is equally divided between AMs and PMs.

How Much Do People Spend to Read Daily and Sunday Newspapers?
1983 Estimate of Annual Expenditures in the United States

(in thousands of dollars)

Weekday	Sunday	Total
$4,895,936	$2,148,162	$7,044,098

Sources: SRDS; Editor and Publisher Yearbook; ABC; CARD.
Prepared by Newspaper Advertising Bureau, Inc.

Readers-Per-Copy Estimates for Total U.S.

	Weekday	Sunday/Weekend
Adults	2.16	2.23
Men	1.06	1.07
Women	1.10	1.16

Sources: Estimate by Newspaper Advertising Bureau, based on 1984 SMRB Study of Media and Markets; Editor and Publisher Yearbook, 1984; and ANM Circulation, '84/'85.

Weekday Newspaper Readers-Per-Copy in Top 25 ADIs

Top 25 ADIs	2.52
Markets 1-5	2.66
Markets 6-10	2.44
Markets 11-25	2.39

Sources: Estimate by Newspaper Advertising Bureau, based on 1982 SMRB Study of Media and Markets; Editor and Publisher Yearbook, 1982; and ANM Circulation, '82/'83.

Average Weekday Coverage of Professionals and Managers
(Total U.S.)

	Total (in 000s	Daily Readers (in 000s)	Percent of Total
Total professionals & managers	25,845	19,590	76%
Individual employment income of $35,000 & over	6,809	5,612	82%
College graduate	16,720	13,062	78%
Involved in EDP, office furnishings/ equipment purchase decisions.	3,585	2,864	80%

Source: 1984 SMRB Study of Media and Markets.

The size of the daily audience varies little over the five weekdays...

Index of Daily Newspaper Readership by Adults

	Average Weekday	Monday	Tuesday	Wednesday	Thursday	Friday
Total adults	100	98	100	102	100	101
Men	101	99	101	102	102	100
Women	99	97	98	102	98	101

Source: Audits & Surveys, Inc., 1982

...mainly because most newspaper readers are subscribers.

How Daily Newspapers Read Yesterday Were Obtained

Subscribe, delivery	74%
Bought single copy	18
Family member brought home	3
Obtained otherwise	5

Source: Audits & Surveys, Inc., 1982

And newspaper reach is virtually constant throughout the year.

Index of Month-by-Month Circulation[a]

	J	F	M	A	M	J	J	A	S	O	N	D
AM	101	101	101	101	100	99	97	98	99	101	101	100
PM	99	100	100	100	100	100	99	99	100	101	101	101
Sun/wknd	100	101	101	101	100	99	98	98	100	101	101	100

a) Average month circulation = 100

Source: Media General, Inc., survey of ICMA members. Data cover the years 1976-1980 and are weighted by circulation size and geographic region to represent national totals.

The Reading of Daily Newspapers:

Average Number of Times Read or Looked At and Average Time Spent Reading Dailies Yesterday by Day of the Week and Number of Papers Read*

	Avg. No. Times Read/Looked at Newspaper	Avg. Time Spent Reading (Minutes)
Monday		
Read 1 daily	1.5	38
Read 2+ dailies	3.0	61
Tuesday		
Read 1 daily	1.5	40
Read 2+ dailies	2.7	59
Wednesday		
Read 1 daily	1.5	38
Read 2+ dailies	3.1	59
Thursday		
Read 1 daily	1.6	42
Read 2+ dailies	3.2	72
Friday		
Read 1 daily	1.6	39
Read 2+ dailies	2.8	58
All Yesterday Readers	1.8	44

*Audits and Surveys, 1982: National sample of 1,979 adults interviewed in person about "yesterday's" newspaper reading. Interviews were equally distributed across the week, Tuesday-Saturday; "yesterday reading" behavior was probed for three dayparts separately.

Page Opening--Reader Traffic

A 1982 study for NAB conducted by Audits and Surveys, Inc. measured the level of exposure to ten pages selected at random from each paper in our national sample. Only spreads of classified advertising were left out.

This research shows that the typical newspaper page is opened by nearly four out of five issue readers (77%). Page opening levels are pretty much the same for men and women and among people at every level of age, income and education, on every day of the week. And the pages that carry every kind of content get opened.[1]

Percent of Readers Opening Daily Newspaper Pages

Total adult readers	77%
Men	75%
Women	79
18-24 years	75%
25-29 years	75
30-34 years	75
35-44 years	77
45-54 years	80
55-64 years	78
65 years or older	78
General news	83
Local news	82
Food, fashion, social news	75
Sports	71
Business	68
Editorial page	80
Comics	80
Entertainment	79

Source: Audits and Surveys, Inc., 1982.

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1) Also see, "The Readership of Newspaper Pages and Sections: Demographic Breakdowns (SMRB, 1984 SMM)" Newspaper Advertising Bureau, 1985.

Estimating Ad Readership

Page opening is the accepted measure of opportunity for advertising exposure. Other measures, such as Starch "Noted" scores, are also widely used as indications of a specific ad's attention value. It is well known that any such measure varies with the nature of the advertised product, size of ad and creative treatment.

Only a readership survey can provide reliable clues to a specific ad's attention value, but in the absence of a survey, average reported readership for a large number of ads may be useful. Average reported readership figures also provide a useful benchmark for evaluating the performance of individual measured ads.

Percent of Ads Read on Opened Pages
(by size of ad)

Less than one-quarter page	12%
One-quarter to less than half page	17%
Half to less than full page	25%
Full page or more	44%

Source: Audits & Surveys, Inc., 1982. (Unweighted base is 16,605 ads of five column inches or more appearing on randomly selected sample pages of newspapers read "yesterday." For more details, see "Newspaper Pages, Ads and Readers".)

Multiple Insertions: How Advertising Exposure Accumulates

It is virtually impossible to obtain direct measures of the number of people reached by multiple ad insertions.

However, if it can be assumed that the likelihood of newspaper readers seeing one or more ads in a campaign is approximately the same as the likelihood of seeing one or more in a single newspaper issue with the same total number of insertions, then it is possible to estimate the cumulative effect of multiple insertions.

The first step is to establish the average exposure level for a single insertion, either through custom research or by the use of an estimate. Given this base figure, it can be assumed that multiple insertions will build along the lines shown in the following table.

Estimated Net Reach and Frequency for Multiple Ad Insertions

Average for		Number of ads in Campaign:					
Single Insertion:		Two	Three	Four	Five	Six	Seven
20%	net reach:*	30%	38%	45%	50%	55%	58%
	avg. freq:	1.3	1.6	1.8	2.0	2.2	2.4
25%	net reach:	37%	46%	53%	59%	63%	66%
	avg. freq:	1.4	1.6	1.9	2.1	2.4	2.6
30%	net reach:	43%	53%	61%	67%	71%	74%
	avg. freq:	1.4	1.7	2.0	2.2	2.5	2.8
35%	net reach:	50%	60%	68%	74%	78%	80%
	avg. freq:	1.4	1.8	2.1	2.4	2.7	3.1
40%	net reach:	55%	65%	73%	79%	83%	85%
	avg. freq:	1.5	1.8	2.2	2.5	2.9	3.3
45%	net reach:	60%	70%	78%	84%	87%	89%
	avg. freq:	1.5	1.9	2.3	2.7	3.1	3.5
50%	net reach:	65%	75%	83%	88%	90%	91%
	avg. freq:	1.5	2.0	2.4	2.9	3.3	3.8

*Net reach=percent of exposed audience reached one or more times.

(For more details see, "Yardstick of Accumulative Newspaper Ad Readership," Newspaper Advertising Bureau, Inc.)

Ad readership varies little whether the ad appears on the left or right side of the page...

	Left	Right
Men	99	102
Women	100	100

...above or below the fold...

	Above Fold	Below Fold
Men	99	101
Women	100	100

...or in the gutter or outside position.

	Gutter	Outside
Men	100	101
Women	101	100

But...editorial environment can affect performance.

Advertisements for Products of Interest to Both Men and Women

Type of Page:	Men	Women
Sports	114	49
Food, home	63	101
General news	100	101

NOTE: Index--Starch "Noted" score for average ad=100

Source: MMN Starch studies of 32,000 ads.

Most Believable Advertising Medium

	Percent Selecting
Newspaper	48.5%
Television	19.3
Direct Mail	12.1
Magazines	11.6
Radio	3.7
No answer	4.8

Source: Home Testing Institute, 1984

Percent Who Look Forward to Advertising in Five Media

	Percent*
Newspaper ads	60%
Mail ads	28
Magazine ads	20
Television commercials	7
Radio commercials	6

*Total exceeds 100% because of multiple mentions.

Source: Response Analysis Corporation, 1982

Percent of This Week's Purchases Not Planned Last Week

	Percent Unplanned
Women's wear (average)	86%
Men's wear	82
Children's infants' wear	85
Stationery, gift items	76
Major appliances, TV, stereo	88
Furniture, furnishings	79
Household textiles, sewing items	85
Housewares and supplies	95
Sporting goods	85

Advertising Influence on Last Unplanned Purchase

	Saw or Heard Advertising		Source of Advertising
Total reporting unplanned purchase	41%	=	100%*
Newspaper			60%
Television			17
Direct mail			15
Magazine			6
Radio			5
Something left at door			3
No answer			1

*Total exceeds 100% because of multiple answers.

Source: Response Analysis Corporation, 1982.

(For more details, see "How America Shops and Buys," Newspaper Advertising Bureau, 1983.)

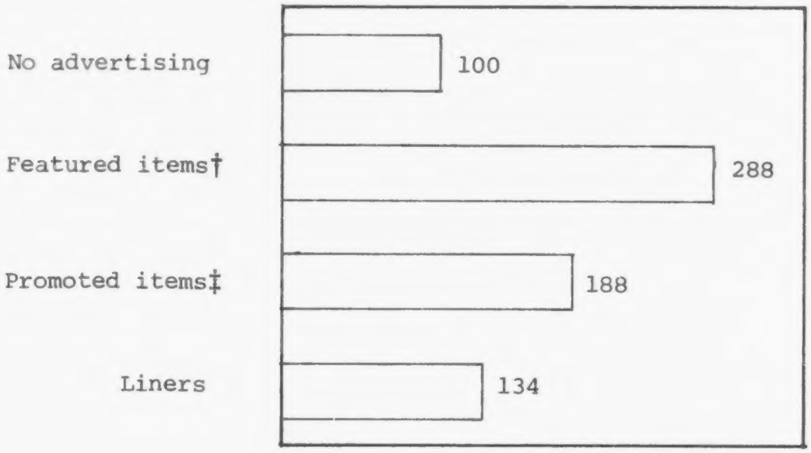
How Newspaper Advertising Affects Package Good Sales

In 1980, computerized scanner records were used to analyze the effect of ad linage and price cuts on product movement. The analysis covered 479 items appearing in 20 ads from 17 stores. Unit and dollar sales were recorded for the week of the ad and two weeks before the ad (the base period).

Results show that, on average, newspaper advertising triples the volume of items advertised at cut prices. The sales effectiveness of newspaper ads doesn't depend on price cuts--advertising goods at regular prices doubles sales.

The movement of items advertised at regular prices is closely tied to the amount of advertising space given an item.

Sales results for items advertised at regular prices



†Four square inches or more.

‡Larger than a liner but less than four square inches.

Cents-Off Coupons

Newspapers continue to be the number-one medium for coupons.

Coupon Distribution Patterns

	1984	1983	1982
Newspapers	82.1%	80.1%	77.9%
Daily ROP	17.3	20.0	23.1
Co-op	10.0	12.2	15.2
Sunday Magazine	3.3	4.9	6.3
F.S.I. Sunday	42.7	36.6	33.3
Weekday	8.8	6.4	NA
Magazines	8.5	10.0	11.4
Direct Mail	4.4	4.3	3.8
In/on Pack	5.0	5.6	6.9

Source: Nielsen Clearing House
(Figures do not include store coupons.)

Usage of Cents-Off Coupons from Newspapers by Female Homemakers

	Percent of	
	Female Homemakers	Coupon Users
Ever use cents-off coupons	68%	100%
Use coupons from newspapers	60%	87%
Heavy -- more than once a week	10	14
Medium -- once a week	25	36
Light -- less often	25	37

Source: SMRB, 1984 Study of Media and Markets

Advertising-to-Sales Ratios for Selected Retail Stores and Services (1983)

	Ad Dollars as Percent of Sales
Amusement & recreation services (misc.)	4.4%
Apparel & accessories stores	2.4
Auto dealers & gas stations	1.4
Automotive repair & service	3.0
Computer programs & software	2.3
Computer stores	2.8
Data processing services	1.5
Department stores	3.1
Drug & proprietary stores	1.8
Eating places	3.2
Educational services	4.7
Equipment rental & leasing	3.5
Finance services	3.1
Fuel & ice dealers	0.8
Furniture stores	6.8
Grocery stores	1.3
Hotels, motels	2.6
Household appliance stores	5.4
Insurance agents, brokers	0.8
Jewelry stores	5.8
Lumber & building materials	2.3
Mail order houses	17.1
Motion picture theaters	4.7
Personal credit institutions	1.6
Personal services	5.7
Radio & TV broadcasters	3.7
Real estate	2.5
Savings & loan associations	0.5
Shoe stores	1.6
Women's ready to wear	2.1

Source: Special analysis by Schonfeld and Associates of SEC data for 5,000 publicly owned companies, as reported in Advertising Age, August 13, 1984.

TOTAL ADVERTISING VOLUME IN THE UNITED STATES

Prepared by McCann-Erickson, Inc., Revised

MILLIONS OF DOLLARS

MEDIUM	1980		1981		1982		1983	
Newspapers total	$14,794	27.6%	$16,528	27.4%	$17,694	26.6%	$20,582	27.1%
national	1,963	3.7	2,259	3.8	2,452	3.7	2,734	3.6
local	12,831	23.9	14,269	23.6	15,242	22.9	17,848	23.5
Magazines total	3,149	5.9	3,533	5.8	3,710	5.6	4,233	5.6
weeklies	1,418	2.6	1,598	2.6	1,659	2.5	1,917	2.5
women's	782	1.5	853	1.4	904	1.4	1,056	1.4
monthlies	949	1.8	1,082	1.8	1,147	1.7	1,260	1.7
Farm publications total	130	0.2	146	0.2	148	0.2	163	0.2
Television total	11,366	21.3	12,650	20.9	14,329	21.5	16,136	21.3
network	5,130	9.6	5,575	9.2	6,210	9.3	7,017	9.3
spot	3,269	6.1	3,730	6.2	4,360	6.6	4,796	6.3
local	2,967	5.6	3,345	5.5	3,759	5.6	4,323	5.7
Radio total	3,702	6.9	4,230	7.0	4,670	7.0	5,210	6.9
network	183	0.3	230	0.4	255	0.4	296	0.4
spot	779	1.5	879	1.4	923	1.4	1,038	1.4
local	2,740	5.1	3,121	5.2	3,492	5.2	3,876	5.1
Direct Mail total	7,596	14.2	8,944	14.8	10,319	15.5	11,795	15.6
Business Papers total	1,674	3.1	1,841	3.1	1,876	2.8	1,990	2.6
Outdoor total	578	1.1	650	1.1	721	1.1	794	1.1
national	364	0.7	419	0.7	465	0.7	512	0.7
local	214	0.4	231	0.4	256	0.4	282	0.4
Miscellaneous total	10,561	19.7	11,908	19.7	13,113	19.7	14,947	19.6
national	5,578	10.4	6,334	10.5	7,067	10.6	7,951	10.5
local	4,983	9.3	5,574	9.2	6,046	9.1	6,996	9.1
Total national	29,815	55.7	33,890	56.1	37,785	56.8	42,525	56.1
Total local	23,735	44.3	26,540	43.9	28,795	43.2	33,325	43.9
GRAND TOTAL	$53,550	100.0%	$60,430	100.0%	$66,580	100.0%	$75,850	100.0%

Estimates include all costs: Time and talent, space and production

Source: McCann-Erickson, Inc.

Prepared by: Newspaper Advertising Bureau, Inc.

Newspaper Advertising Expenditures*

(millions of dollars)

	National	Retail	Classified	Total
1974	$1,105	$ 4,563	$2,174	$ 7,842
1976	1,342	5,668	2,608	9,618
1978	1,541	7,023	3,649	12,214
1980	1,963	8,609	4,222	14,794
1982	2,452	10,390	4,852	17,694
1983	2,734	11,841	6,006	20,582

* Production costs included.

Source: McCann-Erickson, Inc.;
NAB estimates for classified.

Newspaper Insert Advertising Volume

	Free-Standing Inserts (Card & Multi-Page) (millions)	Free-Standing Insert Revenue[a] (thousands)
1975	15,800	NA
1977	20,101	$1,086,000
1979	27,132	1,776,604
1981	28,708	2,288,542
1983	35,727	3,095,000
1984 (est.)	39,300	3,559,000

Typical National Insert CPMs for Sunday Newspapers

(Top 100 MSAs)

	Total Circulation (in 000s)	Cost per thousand for:			
		2 pages	4 pages	8 pages	12 pages
Top 10	15,509.2	$ 33.86	$34.34	$40.13	$45.42
Top 25	24,546.2	34.10	34.74	39.45	44.26
Top 50	33,419.9	33.99	35.17	40.50	45.64
Top 75	38,891.4	33.70	34.99	40.60	46.16
Top 100	42,277.2	33.78	35.13	40.69	46.20

Source: Newspaper Advertising Bureau, Inc., February 1985.

ANNUAL REPORTS PREPARED BY ECONOMIC & MEDIA ANALYSIS UNIT, RESEARCH DEPT.

1. Total advertising volume in the U.S., 1935 to present, (McCann-Erickson estimates).
2. Newspaper advertising expenditures, 1945 to present. National, Retail and Classified.
3. U.S. Daily and Sunday newspapers - 1945 to present - Number and Circulation.
4. How much do people spend to read daily and Sunday newspapers, 1945 - present.
5. National advertising expenditures in major media by classification.
6. Daily newspapers in 314 MSA's: Households, coverage, circulation, column inch rate, cost of SAU quarter page, SAU half page, and SAU full page.
7. Daily newspapers in 209 ADI's: Households, coverage, circulation, column inch rate, cost of SAU quarter page, SAU half page, and SAU full page.
8. Sunday newspapers in 314 MSA's: Households, coverage, etc.
9. Sunday newspapers in 209 ADI's: Households, coverage, etc.
10. Daily newspapers in 314 MSA's, R.O.P. color edition.
11. Daily newspapers in 209 ADI's, R.O.P. color edition.
12. Cumulative circulation and rates of daily newspapers in 314 MSA's necessary to obtain 60% household coverage in each market.
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16. Newspaper groups - daily - 314 MSA's.
17. Newspaper groups - daily - 209 ADI's.
18. Newspaper groups - Sunday - 314 MSA's.
19. Newspaper groups - Sunday - 209 ADI's.
20. ROP color premium in 314 MSA's (breakdown by 100 markets - 1,2, and 3 color).
21. Daily and Sunday newspapers with zone edition.
22. Cities in the U.S. with two or more newspapers.
23. Newspapers in the U.S. not accepting beer, wine or liquor advertising.
24. Media Breakdown of U.S. agencies billing $30 million or more.
25. Newspapers not offering a 2% cash discount.

Please contact: Economic and Media Analysis Unit, (212) 704-4561.

NAB Research Reports

	Member Prices
AD READERSHIP	
Frequent Fliers and Airline Ads (1984)	$ 4.00
Air Travel Study (1981)	4.75
Do Corporate Ads Get Read? Evidence from a Follow-up Study in 5 Cities (1980)	1.75
Does Corporate Advertising Get Read? (1980)	1.00
How Newspaper Ads Select Customers (1980)	2/1.00
Research Facts on Position, Timing and Creativity in Newspaper Advertising (1976)	1.50
The Effects of Placing Ads for the Same Product Category on the Same Page: A Field Experiment (1976)	3.00
Retail Inserts in Daily Newspaper: A 4-Market Readership Study (1976)	2.50
Creative Variables and Ad Readership (1975)	2.00
Readership of Coupon vs. No-Coupon Ads (1974)	1.00
Color in Newspaper Advertising: Is It Worth the Money? (1974)	1.50
Reliability of Individual Starch Ad Scores (1972)	1.00
Norms for the Readership of National Ads and an Analysis of the Readership Effects of Ad Size (1972)	2.00
An Evaluation of Changes in Ad Readership Over Time, and Technical Appendix (1972)	2.00
A Comparison of the Readership of 7- vs. 8- Column National Ads (1972)	1.50
Editorial Context: Readership of Men's Interest Ads (Tires) on Sports Pages vs. General News Pages (1972)	1.00
A Summary of Research on the Form of Advertising: Layout, Type Size, Typefaces, Forms of Copy (1971)	1.00
A Study of Blacks in Newspaper Ads (1970)	2.00
Readership of Small Space National Ads in Newspapers (1968)	1.00
Yardstick of Accumulative Newspaper Ad Readership	2/1.00

NAB Research Reports (continued)

	Member Prices
CLASSIFIED ADVERTISING	
Nurses' Attitudes Toward Job-Seeking and Recruitment Advertising (1984)	$ 4.00
Real Estate in the Eighties: A Study of Home Buyers and Sellers (1984)	4.00
Job Search and Recruitment Advertising Study: Engineers and Computer Professionals (1983)	5.00
A National Study of Classified Advertising Readership and Prospect Status (1980)	3.00
Newspaper Real Estate Sections (1978)	2.00
An Eight-Market Study of Recent New Home Buyers (1978)	2.75
Help Wanted Advertising: A National Mail Survey of New Job Holders (1977)	2.50
A Pilot Study of Classified Advertising Managers' Opinions About the Operations and Prospects of Classified Advertising (1977)	1.50
Home Buyers and Renters (1976)	2.50
Classified Advertising: Readership and Use Among Purchasers of General Merchandise and Recreation and Leisure Items (1985)	3.00
Which Ad Pulled Better? Employment Classified Ads (1974)	1.00
Principles for Writing Effective Classified Ads for Private Homes (1968)	2.00
COMPETITIVE MEDIA	
National Study of Direct Mail: An Inventory of Household Mail and How it is Treated (1983)	7.50
Newspapers and Direct Mail: A Study of Advertising Believability (1982)	.50
Trends in TV Commercial Recall, 1965-1981: A Report on Three Surveys of Prime-Time Network Viewers (1981)	2.50

NAB Research Reports (continued)

COMPETITIVE MEDIA (continued)

	Member Prices
The Believability of Advertising in Five Media: Results from a Recent Nationwide Survey (1981)	$ 2.00
Movie Going in the Metropolis (1978)	2.75
Dailies, Shoppers and Pennysavers: A Four-Market Study of Readership and Attitudes (1978)	3.00
Direct Mail (1977)	2.00
A Three-City Survey of Recall of Outdoor Advertising (1976)	1.50
Shoppers on the Move: Movie Going and Movie Goers (1975)	2.00
TV Commercial Recall: A Coincidental Telephone Survey (1975)	2.00
A Pilot Study of Relative Effectiveness of Different Media Mixes in Launching a Motion Picture (1975)	1.50
A Comparative Study of Dailies and Community Weeklies in the St. Louis Metropolitan Area (1973)	2.00

MISCELLANEOUS RESEARCH REPORTS

Key Facts About Newspapers and Advertising - 1985 (1985)	2.00
Women, Work and Markets of the 80's (1979)	4.50
A Five-Market Telephone Survey of "Big Ticket" Purchases (1976)	1.00
The Young Homemakers (1974)	4.00

NEWSPAPER READERSHIP

Estimating Daily Newspaper Reach and Frequency for Major Demographic Segments (1984)	3.00
The Readership of Newspaper Pages and Sections: Demographic Breakdowns (SMRB) (1984)	2.00
1984 Sunday/Weekend Newspaper Readership Demographic Tables for Total U.S., Top 100 Metros and Top 100 DMAs (SMRB) (1984)	3.00
1984 Daily Newspaper Readership Demographic Tables for Total U.S., Top 100 Metros and Top 100 DMAs (SMRB) (1984)	3.00

NAB Research Reports (continued)

	Member Prices
NEWSPAPER READERSHIP (continued)	
Average Weekday and Average Sunday/Weekend Newspaper Coverage of Product and Service Users (1982)	$ 3.00
Newspaper Net Reach Estimator	1.00

REPORTS ON SPECIFIC PRODUCTS AND SERVICES

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Real Estate in the Eighties: A Study of Home Buyers and Sellers (1984)	4.00
The Automotive Aftermarket, 1984: A Study of Primary Car Maintainers (1984)	4.00
Demographic Characteristics of Frequent Movie-Goers (1984)	1.50
Food Shopping in One-Person Households (1983)	2.75
The Emerging New Food Shopper (1982)	3.50
Average Weekday and Average Sunday/Weekend Newspaper Coverage of Product and Service Users (1982)	3.00
Movie Going in the United States and Canada (1981)	2.50
Air Travel Study (1981)	4.75
1980 Automotive Study: Car Buying Plans and Attitudes of Recent New Car Buyers (1980)	4.75
Supermarket Shoppers' Reactions to Future Possibilities (1980)	6.75
Sunday Travel Sections and Vacation Travel Prospects: An Eight-Market Study (1980)	4.50
Women and Car Buying (1979)	3.00
Movie Going in the Metropolis (1978)	2.75
Food Shopping and Eating Patterns (1978)	6.00

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REPORTS ON SPECIFIC PRODUCTS AND SERVICES (continued)	
1980 Post-Election Automotive Study (1981)	$ 5.00
The New American Home (1981)	2.50
Eat and Run: A National Survey of Fast Food Patronage (1978)	3.00
Young Singles and Vacation Travel (1978)	2.75
A Four-Market Survey of Financial Service Users (1977)	3.00
Beer Brand Awareness, TV Viewing and Daily Newspaper Readership Among Male Beer Drinkers (1976)	2.00
Shoppers On The Move: Eating an Evening Meal in a Restaurant (1975)	1.00
Shoppers On The Move: Movie Going and Movie Goers (1975)	2.00
Shoppers On The Move (1975)	2/1.00
Business Air Travel Decisions (1975)	2.00
Books and Leisure Time (1974)	2.00
Young Men and New Cars Revisited (1974)	2.00
Travel and Leisure Time (1974)	2.00
A Three-City Study of Beer Drinking and Lifestyle (1973)	2.00
Wine Drinking and Lifestyle - A Three-City Survey (1973)	2.00
RETAIL	
How America Shops and Buys (1983)	4.00
Food Shopping in One-Person Households (1983)	2.75
The Emerging New Food Shopper (1982)	3.50
Supermarket Ads Move Merchandise (1981)	4/1.00
The New American Home (1981)	2.50

NAB Reserach Reports (continued)

RETAIL (continued)

	Member Prices
Women and Fashion: 1981 Study of Clothes Buying Attitudes and Behavior (1981)	$ 4.50
Supermarket Shoppers' Reactions to Future Possibilities (1980)	6.75
Food Shopping and Eating Patterns (1978)	6.00
Eat and Run: A National Survey of Fast Food Patronage (1978)	3.00
The Double Dividend: A Study of How Advertising Works for Department and Discount Stores (1977)	2.50
The Newspaper Advertising Bureau's UPC Databank - A Preliminary Look (1976)	.50
Retail Inserts in Daily Newspapers: A 4-Market Readership Study (1976)	2.50
Shoppers On The Move: Eating an Evening Meal in a Restaurant (1975)	1.00
Shoppers On The Move: Food and Grocery Section (1975)	1.50
Shoppers On The Move (1975)	2/1.00
The Future of Retailing (1973)	1.00

SALES EFFECTS OF ADVERTISING

A Field Experiment of the Sales Effectiveness of Direct Mail, ROP and Inserts (1985)	3.00
Coupon Facts: Findings on Cents-Off Coupon Usage and Users (1982)	2.00
Supermarket Ads Move Merchandise (1981)	4/1.00
The Sales Effects of National Newspaper Advertising for Two Package Goods Products (1978)	1.50
The Double Dividend: A Study of How Advertising Works for Department and Discount Stores (1977)	2.50

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	Member Prices
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RESEARCH NOTES	
No. 2--Daily Newspaper Coverage of People in High-Level Occupations (1982)	.50
No. 3--The uses of Readers-Per-Copy Estimates (1982)	.50
No. 4--Television Program Listings: Newspapers vs. TV Guide (1982)	.50
No. 5--Moviegoers Assess Their Movie Theatres (1982)	.50
No. 6--The Newspapers's Potential as a Direct Response Medium (1983)	.50
No. 7--Yellow Pages Usage (1983)	.50
No. 8--How to Measure Weekday Newspaper Audiences (1983)	.50

NOTE: In some cases the same research study is listed under two categories.

Research Report

Newspaper Advertising Bureau, Inc. 1180 Avenue of the Americas, New York, New York 10036

COUPON FACTS, 1985

Findings on Cents-Off Coupon Usage and Users

April, 1985

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers. These reports provide the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies. The data were compiled and the report written by John Kelley of the NAB's research department.

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INTRODUCTION

Back in 1895, C. W. Post created the first coupon good for a penny off on Grape Nuts Flakes. In the ninety years since then coupons have become a familiar part of American life.

The Nielsen Clearing House, a leading coupon processor and collector of coupon data, reports that 79% of all U.S. households and 67% of Canadian households use coupons. Simmons Market Research Bureau, in the 1984 "Study of Media & Markets," estimates that 68% of all female homemakers in the U.S. are coupon users.

From a marketer's viewpoint, there are two distinct kinds of cents-off coupons, though consumers may hardly notice the difference. Manufacturer coupons, issued by the manufacturer or distributor of the product, are redeemable at almost any store carrying the product. The manufacturer pays the store the face value of each redeemed coupon, plus a handling fee. All but the largest companies use middlemen known as clearing houses to process these coupons, and fortunately for us, the largest of these processors provide statistics for us to analyze.

> "someone in 79% of all U.S. households...uses coupons"

"In-ad" coupons are issued by a store or chain, and while they might be good only for a specific brand of product, the products must be purchased at that store or chain and the store usually bears expense of couponing (though sometimes through co-op arrangements the manufacturer might take on part or all of the liability).
No statistics are available for this type of couponing.

In addition to statistics gained from clearing houses concerning manufacturer coupons, surveys are also conducted on coupon usage by consumers--the statistics on the previous page were gathered this way. Such statistics are people-based rather than coupon-based, and make no distinction between manufacturer and in-ad coupons. We will make use of both kinds of data, and remind the reader that the coupon-based statistics refer only to manufacturer coupons while the people-based statistics refer to all coupons.

I. THE GROWTH OF COUPONING

1. The Growth in People Using Coupons

According to a survey undertaken by Nielsen Clearing House (1985c) 79% of all households in the United States included at least one person who used some kind of cents-off coupon during the previous year. This is a slight increase from the 76% reported in 1980, though not nearly as much of an increase as was found in previous periods (this survey is not conducted yearly). Of course, as coupon usage approaches 100%, the room for growth becomes extremely limited and a slowdown in the growth rate would be inevitable.

Table 1

HOUSEHOLD USAGE OF COUPONS

1984	79%
1980	76%
1975	65%
1971	58%

Nielsen Clearing House, 1985c

Simmons Market Research Bureau reports that 68% of its female household heads "ever" use coupons, a drop of 3% from the previous years' figure. This might signal some leveling off of coupon usage as saturation is approached. The Simmons figures refer to the female household head while the Nielsen figures refer to usage by any household member.

"as coupon usage approaches 100%, the room for growth becomes extremely limited"

Nielsen reports (1985c) that 25% of all households redeem five or more coupons in a typical week, while 28% use three or four coupons in that period, leaving 26% who use only one or two coupons. This is the first time Nielsen has collected such information and thus we have no historic data on the number of coupons used per week.

Table 2

NUMBER OF COUPONS USED PER WEEK PER HOUSEHOLD

5 or more	25%
3,4	28
1,2	26
None	21

Nielsen Clearing House, 1985c

2. The Growth of Manufacturer Coupons Distributed

The number of manufacturer coupons distributed hit new records in 1984. Over 163 billion coupons were distributed in the U.S. during this past year, which comes to almost 700 coupons for every man, woman and child in the country. This is twice the number of coupons distributed five years ago and 90% more on a per-person basis than five years earlier. The annual rate of growth has slowed down from what it was during the previous two years; in 1984 the number of manufacturer coupons distributed grew 14%, as compared with 20% in 1983 and 17% a year earlier. Grocery coupons still account for more than 80% of coupons distributed, but in 1984 coupons for health and beauty aids showed a higher growth rate. This category grew 21% in the past year, after two years of laggard growth.

Table 3

NUMBER OF MANUFACTURER COUPONS DISTRIBUTED

Year	Total:	Per Person:	Grocery:	H&BA:
1984	163.2 billion	691	133.5 billion	29.7 billion
1983	142.9	611	118.3	24.6
1982	119.5	516	95.5	24.0
1981	102.4	447	79.6	22.8
1980	90.6	399	72.8	17.8
1979	81.2	362	66.5	14.7

Nielsen Clearing House, 1985a, earlier years

3. The Growth of Coupon Usage in Canada

Coupon usage is much lower in Canada than in the United States. When Canadian households were last surveyed in Canada by Nielsen, in 1982, only 67% reported coupon usage during the previous year, and only 16% during the previous week.

Table 4

COUPON USAGE BY CANADIAN HOUSEHOLDS, 1982

Past Week	16%
Past 2-4 Weeks	24
Past 2-3 Months	15
Past 4-12 Months	12
Over a Year Ago	11
Never Use	22

Nielsen Clearing House (Canada), 1982a

"Coupon usage much lower in Canada
than in the United States"

4. Number of Manufacturer Coupons Distributed in Canada

The number of coupons distributed in Canada stood at a bit over 3 1/2 billion in 1984 (NCH, personal correspondence), an impressive figure, but amounting to only 141 coupons per person--a paltry 20% of the U.S. ratio. Couponing in Canada showed a high rate of growth in 1980 and 1981 but has lagged behind couponing growth in the United States over the last three years.

Table 5

ANNUAL GROWTH RATE OF MANUFACTURER COUPONS DISTRIBUTED IN CANADA AND THE U.S.

Year:	Canada:	U.S.:
1984	13%	14%
1983	12	20
1982	12	17
1981	25	13
1980	23	12

Nielsen Clearing House

II. MEDIA CHOICES FOR COUPON DISTRIBUTION

1. Media Distribution Patterns & Trends

Newspapers continue to be the medium of choice for manufacturer coupon distribution--even more so than in previous years. In 1984, 82.1% of all such coupons were distributed by newspapers (Nielsen Clearing House, 1985a)--a record. Over half of all manufacturer coupons were distributed in newspaper inserts, a category not even in existence twenty years ago. In the health and beauty aid field, more than 60% of all manufacturer coupons went into newspaper inserts. While most inserts are carried on Sunday, weekday inserts are starting to have a significant impact.

Table 6

MEDIA DISTRIBUTION OF MANUFACTURER COUPONS, 1984

	Total:	Grocery:	H&BA:
Newspapers:	82.1%	83.4%	76.4%
Daily ROP	17.3	20.1	4.7
Co-op	10.0	10.9	5.7
Sun. Magazine	3.3	3.1	4.3
Sunday Inserts	42.7	39.6	56.5
Daily Inserts	8.8	9.7	5.2
Magazines	8.5%	7.9%	11.5%
Direct Mail	4.4%	3.8%	7.0%
In/On Pack	5.0%	4.9%	5.1%

Table 7

MANUFACTURER COUPON DISTRIBUTION 1980-1984

	1980	1981	1982	1983	1984
Newspapers:	75.6%	78.5%	77.9%	80.1%	82.1%
Daily ROP	31.1	27.3	23.1	20.0	17.3
Co-op	17.1	17.7	15.2	12.2	10.0
Sun. Magazines	9.0	7.3	6.3	4.9	3.3
Sunday Inserts	18.4	26.2	33.3	36.6	42.7
Daily Inserts	--	--	--	6.4	8.8
Magazines	13.3%	11.8%	11.4%	10.0%	8.5%
Direct Mail	3.4%	3.3%	3.8%	4.3%	4.4%
In/On Pack	7.7%	6.4%	6.9%	5.6%	5.0%

Nielsen Clearing House, 1985a,b,earlier years

2. Redemption Rates

Many factors influence redemption rates. One major factor is the medium used for distribution. Redemption rates can also be affected by: the face value of the coupon, the kind of product being couponed, competitive activity, the visual appeal and persuasiveness of the ad, and the availability of the product--a well-run program includes promotions directed at retailers to make sure they know of the coupon push and have time to stock up.

Because of the many factors apart from media that affect redemption rates, Nielsen likes to give middle-half ranges, the redemption rates for coupons at the 25th and 75th percentile, which would include the middle 50% of all coupons redeemed. Grocery coupons generally redeem at a higher rate than coupons for health and beauty aids, which usually cost more and have lower consumption levels.

Table 8

REDEMPTION RATES FOR MANUFACTURER COUPONS: GROCERY ITEMS

	Nielsen Average:	Middle-Half Redemption Rate:	Number Redeemed:
Newspapers:			
ROP Solo	2.6%	1.0%- 4.0%	697.7 million
Co-op	2.7%	1.3%- 4.1%	392.9 million
Sunday Magazine	2.1%	1.1%- 3.0%	86.9 million
Weekday Insert	4.2%	2.4%- 6.1%	543.9 million
Sunday Insert	4.5%	2.7%- 6.3%	2,379.0 million
Magazines:			
On Page	2.0%	1.0%- 3.0%	189.6 million
Pop Up	4.7%	2.5%- 6.6%	50.3 million
Direct Mail	8.1%	4.7%-13.1%	410.9 million

Nielsen Clearing House, 1985a

Table 9

REDEMPTION RATES FOR MANUFACTURER COUPONS: HEALTH & BEAUTY AIDS

	Nielsen Average:	Middle-Half Redemption Rate:	Number Redeemed:
Newspapers:			
ROP Solo	1.6%	0.5%- 2.5%	22.3 million
Co-op	1.8%	0.7%- 2.8%	30.5 million
Sunday Magazine	1.0%	0.4%- 1.6%	12.8 million
Weekday Insert	2.5%	1.4%- 3.7%	38.6 million
Sunday Insert	3.0%	1.9%- 4.3%	503.4 million
Magazines:			
On Page	0.9%	0.4%- 1.5%	27.5 million
Pop Up	3.2%	2.1%- 4.4%	11.4 million
Direct Mail	7.0%	3.2%-10.7%	145.5 million

Nielsen Clearing House, 1985b

3. Redemption Rates for In/On Package Coupons

Besides being distributed through the mass media, coupons are also distributed on package labels or inside the package. As would be expected, "regular" coupons for the product contained in the package get the highest redemption rates, as they go to people who are already users of the product, but even coupons for different ("cross") products have high redemption rates. While in/on pack coupons are a cost-efficient way of distributing coupons, they do not permit mass marketing and can't be targeted for a narrow time range.

A new wrinkle is "instant on-pack" coupons which are redeemable for the product they appear on at the time of purchase. They are, in effect, a discount on the price of the product which manufacturers can make sure is passed on to the customers. The fact that less than one third of these coupons are redeemed, though, would indicate that consumers find them confusing.

Table 10

REDEMPTION RATES FOR MANUFACTURER COUPONS:
IN/ON PACKAGE COUPONS

	Groceries		Health & Beauty	
	Avg.	M.H.Red.Rt.	Avg.	M.H.Red.Rt.
Regular In-Pack	16.6%	7.0%-27.1%	10.9%	5.0%-17.1%
Regular On-Pack	13.3%	6.3%-24.7%	12.2%	6.0%-19.5%
Cross In-Pack	5.8%	2.6%- 8.7%	3.6%	2.2%- 5.3%
Cross On-Pack	5.1%	2.4%- 8.0%	3.1%	1.8%- 4.7%
Instant On-Pack	27.9%	14.0%-47.4%	30.4%	15.1%-47.9%

Nielsen Clearing House 1985a,b

4. Where Users Get Coupons

According to Simmons, 60% of all female homemakers obtain cents-off coupons from newspapers while 47% obtain them from the mail, 45% from magazines and 41% from packages. In the course of a week, 34% of the female homemakers report using newspaper coupons while 18% report using mail or magazine coupons and 15% report redeeming in/on pack coupons.

Table 11

COUPON USAGE BY MEDIA OBTAINED
FROM BY FEMALE HOMEMAKERS

	Newspapers	Mail	Magazines	In/On Pack
Ever Use	60%	47%	45%	41%
More Than Weekly	10	5	5	4
Once a Week	25	13	13	11
2 - 3 Times Monthly	14	11	13	11
Once a Month	5	8	7	6
Less Often	6	10	6	9

SMRB, 1984

5. Distribution of Manufacturer Coupons in Canada

In comparison to the pattern found in the states, Canadian coupons are much less likely to appear in newspapers, equally likely to appear in magazines, and more likely to use other distribution methods. In 1981, the last year Nielsen undertook a Canadian survey, almost a third of all manufacturer coupons (31%) were distributed in/on pack. Direct mail has a 24% share of Canadian couponing, with almost 5% of that coming from a special mail promotion put out by the Kiwanis clubs. Magazines account for 11% of manufacturer coupons, and egg cartons (a medium not even measured in the states) account for 7%.

In Canada, newspapers carry just 27% of manufacturer coupons, and almost all of this amount represents ROP coupons --in the same year, newspaper coupons in the U.S. were split about equally between ROP and inserts. The thick Sunday paper, a vehicle heavily favored by couponers in the states, is not an institution in Canada--in fact, no Sunday editions were published in Canada until 1939.

Table 12

MANUFACTURER COUPON DISTRIBUTION
IN CANADA, 1981

Newspapers	27%
ROP	23
Inserts	4
Magazines	11%
Direct Mail	24%
In/On Pack	31%
Egg Cartons	7%

Nielsen Clearing House (Canada), 1982b

6. Redemption Rates of Canadian Coupons

The latest redemption rates that Nielsen compiled are also from 1981. Redemption rates have dropped since then in the U.S., but that is widely speculated to be as a result of so many coupons being in circulation in the states--certainly not the case in the north country. As a result, coupon redemption rates in Canada may have increased since the latest available figures compiled.

"coupon redemption rates in Canada may have increased"

Table 13

MANUFACTURER COUPON REDEMPTION RATES
FOR CANADA, 1981

	Food & Cleaning	Personal Care	Pet-Foods
Newspapers:			
ROP	1.7%	0.8%	1.3%
Inserts	5.1%	--	--
Magazines	4.3%	6.2%	3.5%
Direct Mail:			
General & Co-op	10.0%	7.8%	5.6%
Rideau Kiwanis	7.2%	--	--
In/On Pack:			
Regular In-Pack	23.3%	21.9%	34.3%
Regular On-Pack	17.7%	25.0%	18.5%
Cross In-Pack	12.0%	12.0%	16.0%
Cross On-Pack	8.2%	4.5%	4.2%
Egg Cartons	12.1%	11.3%	7.0%

Nielsen Clearing House (Canada), 1985b

III. THE FACE VALUE OF CENTS-OFF COUPONS

1. The Rise in the Average Face Value

The face value of manufacturer coupons has been increasing lately in terms of real dollars--that is, dollars adjusted for inflation. While grocery prices in general have increased 41% in the past five years (BLS, 1984), the face value of grocery coupons has increased by 53%, to an average of 26.2 cents. The face value for health and beauty aid coupons has increased 82% in the past five years while the price index for all items has increased only 43%. These coupons now have an average face value of 34.3 cents. This situation is markedly different from that of past years when coupon face values did not grow enough to keep up with inflation.

Table 14

AVERAGE FACE VALUE OF MANUFACTURER COUPONS

	Groceries		Health & Beauty Aids	
Year	Face Value	In '79 cents	Face Value	In '79 cents
1979	17.1 cents	17.1 cents	18.8 cents	18.8 cents
1980	18.5	17.0	20.8	21.3
1981	19.8	21.4	24.2	23.6
1982	21.7	17.8	26.1	25.0
1983	24.1	19.4	29.0	25.8
1984	26.2	20.3	34.3	26.9

Nielsen Clearing House, 1985, earlier years; BLS, 1984

2. Distribution of Face Values

While the average (mean) face value of grocery coupons stood at 26.2 cents in 1984, there weren't any coupons around quite that average; however, a fourth of all coupons distributed did have face values of 30 cents, while 20% had a face value of 25 cents and an equal percent had a face value of 20 cents. The 5-cents-off coupons of yesteryear are virtually extinct.

Health and beauty aid coupons have an average face value of 34.3 cents, but the most frequently issued amount was only 25 cents--this accounted for a third of all manufacturer H&BA coupons issued. The second most popular category was in the fifty cents and over grouping, bringing the average up. H&BA coupons generally carry a higher face value than grocery coupons as the merchandise itself usually costs more than the typical grocery item. On a percent-off basis, the discount might even be smaller.

Table 15

DISTRIBUTION OF FACE VALUES OF MANUFACTURER COUPONS

Face Value	Grocery	H&BA
10-12 cents	6.5%	0.7%
15 cents	2.1	4.6
20 cents	20.9	13.1
25 cents	20.6	33.9
30 cents	25.2	9.7
35-45 cents	14.6	12.7
50 cents & over	10.1	25.3

Nielsen Clearing House, 1985a

3. Minimum Face Values Consumers Would Use

Nielsen asked consumers the minimum face value a coupon would need to have before they would bother to use it. For a product they had used before, 43% said they would use a coupon worth less than 15 cents, but for a product they had never before sampled, the majority would only use coupons worth more than 25 cents.

Table 16

MINIMUM VALUE BEFORE USING COUPONS

Face Value	Product Used Before	Product Never Used
Under 15 cents	43%	9%
15 - 24 cents	33	13
25 cents	16	27
Over 25 cents	8	51

Nielsen Clearing House, 1985c

4. Average Face Value of Canadian Coupons

Canadian coupons have an average face value of 32.0 cents (Canadian), which is worth about 24 cents in U.S. currency. This is a bit below the face value of coupons in the states. The growth rate has kept pace with inflation in the last few years, however.

Table 17

FACE VALUE OF CANADIAN COUPONS

Year	Average Value	In 1981 Cents
1981	25.6 cents	25.6 cents
1982	28.2	25.4
1983	31.5	26.9
1984	32.0	26.2

Nielsen Clearing House (Canada), personal correspondence

5. Distribution of Face Values in Canada

The most recent figures available on the distribution of the face value of Canadian coupons were released in 1982 and were for the previous year, when the average face value was 25.6 cents (Canadian), 4.4 cents less than it was last year. The most frequently distributed face value stood at 15 cents, with one-fifth of the coupons distributed carrying that rate. Coupons worth 25 cents each accounted for 13% of the manufacturer coupons distributed in the "Great White North".

Table 18

DISTRIBUTION OF CANADIAN MANUFACTURER COUPONS BY FACE VALUE, 1981

Face Value	% Distrbuted
10 cents	10%
12	3
13	4
15	20
18	3
20	11
23	3
25	13
30	3
35	5
40	6
50	6
Other values	13

Nielsen Clearing House (Canada), 1982b

6. Minimum Face Value Canadians Would Use

The median face value at which Canadians would use cents-off coupons was 15 cents (Canadian), according to the 1982 Nielsen survey that Nielsen took of Canadian shoppers. Eleven percent would not even bother to use a coupon unless the face value were at least 50 cents.

Table 19

MINIMUM VALUE BEFORE CANADIAN SHOPPERS WOULD USE COUPONS, 1982

Min. Face Val.	% Using
10 cents	22%
15	18
20	8
25	14
30	2
50	11
Depends on product/ don't know	25

Nielsen Clearing House (Canada), 1982a

IV. COUPON USERS

1. Who Uses Coupons?

According to the Simmons Market Research Bureau, two-thirds of all female homemakers use cents-off coupons. Respondents were not asked to distinguish between manufacturer and store coupons. Coupon users include the majority of women in every demographic category surveyed, but the prototypical coupon user is a white, middle-aged married woman living in a northeastern suburb. She is a college graduate holding a full-time job, and she comes from a household with an annual income of at least $25,000, with at least two other people in it, and with at least one of those being either a child under two or a teenager.

While affluent women such as the one in the composite portrait above are the most likely to use coupons, coupon usage is below average among those who are poor and most in need of ways to save money. While this might seem an anomaly, the poorer people are the least likely to buy the newspapers and magazines through which most coupons are distributed, and are not even as likely to receive the zip-coded coupon mailings people living in upper-income areas get. Even among low-income homemakers, however, the majority use cents-off coupons.

"two-thirds of all female homemakers use cents-off coupons"

Table 20

COUPON USERS AMONG FEMALE HOMEMAKERS

Average	68%
Age: 18 - 24	60%
25 - 34	71%
35 - 44	70%
45 - 54	68%
55 - 64	72%
65 and over	64%
Marital Status:	
Married	73%
Single	57%
Div/Wid/Sep	62
Race: White	71%
Black	50%
Other	64%
Age of Children	
Has no children	66%
Has children	74%
Under 2 years	72%
2 - 5 years	71%
6 - 11 years	67%
Other	65%
Geographical Region:	
Northeast	77%
North Central	76%
South	58%
West	66%
Household Income:	
$30,000 & over	73%
$25,000 - $29,999	73%
$20,000 - $24,999	72%
$15,000 - $19,999	68%
$10,000 - $14,999	69%
Less than $10,000	58%
Educational Attainment:	
College Graduate	73%
Some College	72%
High School Grad	72%
Not HS Graduate	57%
Working Status:	
Full Time	69%
Part Time	71%
Do Not Work	67%
Occupation:	
Professional, Mgr	72%
Tech, Cler, Sales	71%
Craftsman,Foreman	67%
Other	65%
County Size: A	68%
B	72%
C	67%
D	61%
City Size:	
Central City	67%
Suburb	73%
Non-metro	62%

Simmons Market Research Bureau, 1985

2. Canadian Coupon Users

The percent of Canadian households that used cents-off coupons in the past year stood at 67%, according to the latest available survey issued by the Nielsen Clearing House (Canada) in 1982. Coupon usage patterns in Canada are similar to that in the United States, with upper-income, middle-aged, married women most likely to be coupon users. Again, however, the majority of households in all demographic segments contains coupon users.

Table 21

HOUSEHOLD COUPON USAGE IN CANADA, 1982

Average	67%		
Sex: Female	69%	Marital Status:	
Male	54%	Married	71%
		Other	54%
Male HH Occupation			
White Collar	70%	Household Income:	
Blue Collar	64%	Over $30,000 (Can)	70%
Retired, Other	68%	$20,001 - $30,000	68%
		$12,001 - $20,000	66%
Female HH Occupation:		$12,000 & Under	62%
White Collar	70%		
Blue Collar	55%		
Homemaker	70%		
Other	64%		

Nielsen Clearing House (Canada) 1982b

V. RESPONSE AND TIMING PATTERNS FOR COUPONS

1. How Couponing Affects Product Sales Patterns

Through NABSCAN, a private company that measures sales of products on a daily basis through computerized scanning, an analysis was made of 50 ROP ads that ran in daily newspapers. The average ad carried a coupon worth 25 cents. The coupons appeared from 1981 - 1984 and sales results were gathered from selected grocery stores in various parts of the country equipped with scanning devices.

The average coupon ad resulted in an increase of sales of 40% (the median amount) during the week the coupon appeared from those of the previous week. And in three-quarters of the cases, sales continued at an above average rate the following week. Sales the second week following the coupon advertisement were 23% above those of the base week. In a few cases, the sales the second week after the coupon appeared even exceeded those of the first week.

TABLE 22

INDEX OF UNIT SALES RESULTS OF
NEWSPAPER ROP COUPON ADS

Product	Coupon Amt	Week Before Ad	Week Of Ad	Week After Ad
Ajax & Baggies	15 cents ea	100	148	87
Aunt Jemima	10	100	178	195
Ben Gay	30	100	143	151
Betty Crocker Mix	10	100	130	160
Betty Crocker Potatoes	20	100	113	91
Campbells Pork & Beans	12/15	100	147	61
Cheerios & Wheaties	50 both	100	135	136
Cheeze Ritz Crackers	15	100	127	98
Chex Cereals	50	100	286	365
Chex Cereals	50	100	123	102
Coca Cola	20/50	100	147	116
Coca Cola Products	50	100	132	217
Delicaseas Seafood	25	100	208	257
Diet Rite Cola	30	100	124	98
Doxsee Clams or Chowder	30 for 2	100	367	392
Gorton's Seafood	20	100	126	88
Heinz Sauce	40 for 2	100	422	199
Kelloggs Crispix	50	100	3411	3378
Kraft Parmesan	20	100	118	98
Lipton Soup	15	100	196	129
Lipton Soup	15	100	147	157
Minute Maid	15	100	302	281
Miss Breck Spray	20/50	100	134	111
Mo~rell Wieners	25	100	186	94
Mrs. Pauls Fillets	30	100	164	114

INDEX OF COUPON SALES (Cont'd)

Product	Coupon Amt	Week Before Ad	Week Of Ad	Week After Ad
Nabisco Champs	25 cents	100	266	390
Nabisco Chip Ahoy!	25	100	132	135
Nestea	28	100	132	105
New Breed Dog Food	100	100	128	95
Oscar Meyer Cheese Hot Dogs	15	100	136	173
Pennsylvania Dutch Egg Noodles	10	100	161	169
Pepsi	20	100	239	111
Philadelphia Cheese	20	100	156	141
Purex Detergent	25	100	128	91
Purina Dinners	25	100	119	115
Ralston Purina Breakfast Items	35	100	116	123
Reynolds Wrap	25	100	151	112
Sanka Coffee	60	100	121	114
Sego Diet Drink	15	100	123	122
Snowy Bleach	20/40	100	143	128
Solo Detergent	50	100	126	124
Sweet 'N Low	20/40	100	123	129
Sweet 'N Low	20	100	130	100
Tang	40	100	113	119
Uncle Ben's Rice	15	100	179	93
Van de Kamp's Seafood	20	100	169	176
Vera Toilet Tissues	25	100	127	95
Weaver Rondelets	25	100	193	170
Woolite	10/25	100	123	110
Yes Detergent	30	100	157	129

NABSCAN, 1981-1984

Once a coupon is issued, it may get redeemed fairly quickly--but woe to any manufacturer who expects to be rid of supporting them that quickly. While many people redeem coupons the day they see them, not everyone redeems them so quickly. A study done by Hayes Nedved for the Newspaper Advertising Bureau reveals that 66% of the "principal" grocery shoppers keep some kind of coupon file, and there is now even a personal computer program that keeps listings of coupons sorted by product and reminds the user when the expiration date is near.

2. Timing From Appearance Of Ad Through Processing

The redemption of coupons only starts when the consumer uses them at the store. Large stores may then submit the coupons they get to their chain or division headquarters, to their clearing house or to the various clearing houses acting for the manufacturers on a weekly basis, according to the Nielsen Clearing House's Product Managers Guide. Small stores take longer--in fact in the '72 edition of the book they mentioned small stores might turn them over every six months. (The '80 edition keeps the period vague!) And of course, the more levels the coupons have to go through to get back to the manufacturer or his clearing house, the longer the process will take. Thus even if the consumer redeems the coupons quickly, the manufacturer will still be getting redemptions over a year after the coupons were distributed.

The medium coupons are distributed in, of course, effects the speed of redemption. Newspapers which come out daily tend to effect immediate redemption as do direct mail coupons, while magazine coupons have somewhat slower redemptions. In/on pack coupons, whose distribution is dependent on product turnover, takes the longest time of all. The median time of redemption of grocery items carried by newspapers is about four months, while magazine coupons take six months to reach that level and "in/on pack" coupons a month longer than that. Coupons for health and beauty aids take longer to get redeemed owing to the lower turnover of the items they are issued for.

The redemption timing for newspaper ROP coupons in Canada in 1981, the latest year for which figures are available, is shorter than that in the States. Fifty percent of such manufacturer coupons are redeemed in the third month while half of all inserts are redeemed in the fifth month--the same as in the U.S. Magazine and direct mail coupons both take half a year before half of the coupons are redeemed.

VI. OTHER TOPICS IN COUPONING

1. Standardization of Coupon Size and Design

Coupons have appeared in all sorts of shapes and sizes. One fill-in coupon even required the sender to fill in their name against a dark background--no problem for those with a pen that wrote with white ink. Standardization of coupons to at least some degree does have its benefits. A coupon itself draws people to an ad, thus a coupon that looks like a coupon will get attention. Then too, standardized sizes helps in the handling process. The Nielsen clearing house recommends that coupons be issued in dollar bill sizes or in 1/3 IBM-card size (2 5/8" x 6 1/8"). Other sizes are difficult to bundle and won't fit in sorting bins.

Arthur Anderson, in a 1981 study, recommended: 1). the elimination of expiration dates on coupons; 2). the standard placement of the words "STORE COUPON: NO EXPIRATION DATE" (or the expiration date if one is needed) in capital letters centered flush at the top or bottom of the coupon; 3). the use of UPC codes on coupons; and 4). the elimination of hard to handle coupons including those of unusual sizes, self-destruct coupons, those with sticky backs used so they can be peeled off of pages or packages, and complicated purchase requirements including size and multiple-purchase specifications. While these recommendations may hold down clearing costs and eliminate mistaken redemptions, manufacturers are likely to balk at some of these suggestions. Expiration dates lead to quicker redemptions, self-destruct and sticky coupons have higher redemption rates and the use of special purchase requirements help meet marketing objectives (Varadarajan, 1982)

2. UPC Scanning

The use of the UPC code on coupons is only starting to catch on. At the moment, a few large manufacturers who handle their redemptions internally, such as General Foods, are putting UPC codes on their coupons to use scanning during the clearing process (Varadarajan, 1982). Wegman's is using scanners at the check-out counter, however, where the face value of store-issued coupons are automatically deducted from the total bill and verification of proper product purchase is made (Barbati, 1984). Arthur Anderson predicts that when scanning is universally used, $8 to $12-million will be saved yearly (Supermarket Business, 1983).

3. Increasing the Effectiveness of Coupons

When it comes to coupon ads, otherwise original copywriters seem to feel creativity doesn't matter. Dale Landsman of Marsteller Advertising (1984) finds coupon-carrying ads either make no attempt at creativity, give the impression they were originally non-coupon ads with the certificate slapped on as an afterthought, or were trying to communicate too many other ideas besides the value of the coupon. Landsman recommends coupon ads contain strong graphics, have inviting headlines, keep their message simple and not act ashamed to have coupons in them. Remember, coupons redeeming at the 75th percentile did three to four times better than those redeeming at the 25th percentile in the same medium (see p. 9).

Finally, remember that the effectiveness of coupons is not simply measured by redemptions. A coupon campaign should encourage first time users to keep using the product, thus increasing sales well beyond what redemptions bring in. And a well orchestrated campaign should encourage new stores to start carrying the product. Thus, a properly executed coupon program goes well beyond selling only the product bought with the coupon.

APPENDIX A

SOURCES FOR BUYING NEWSPAPER COUPON ADVERTISING

1. Newspaper Representatives

A complete list of newspapers and their "reps" can be found in the Editor & Publisher Yearbook. For copies, write or call:

Editor & Publisher
575 Lexington Avenue
New York NY 10022
212-752-7500

2. Sunday Magazines

Family Weekly
1515 Broadway
New York NY 10036
212-719-6900

Parade Magazine
750 Third Avenue
New York NY 10017
212-573-7000

Sunday Magazine Network
260 Madison Avenue
New York NY 10016

3. ROP Co-op Programs

Newspaper Co-op Couponing
Marketing Corp. of America
285 Riverside Avenue
Westport CT 0880
203-226-1061

Product Movers Plus
Marketing Showcase, Inc.
621 Avenue of
the Americas
New York NY 10011

The Sunflower Group
7721 West 79th St.
Overland Park KS 66204
913-341-7536

4. National Newspaper Insert Programs (Biweekly)

BFD Color Inserts
Marketing Corp. of America
285 Riverside Avenue
Westport CT 06880
203-226-1061
(Best Food Day)

Product Movers Inserts
Marketing Showcase, Inc.
621 Avenue of the Americas
New York NY 10011
(Sunday)

Blair Inserts
John Blair Marketing
717 Fifth Avenue
New York NY 10022
212-980-5252
(Sunday)

Valassis Impact Inserts
George F. Valassis & Co.
34115 W. Twelve Mile Rd.
Farmington Hills MI 48018
(Sunday)

5. Specialized Insert Programs

Brands Bonanza
11959 Northup W.
Bellevue WA 98005
206-445-8450
Annual: Montana,
Northwest, Alaska

Great Events Promotions
125 Mineola Avenue
Roslyn Heights NY 11577
516-484-0411
Annual: Metro NY

Shop & Save Inserts
McIntyre & Dodd Marketing
44 Eglinton Ave. West
Suite 703
Toronto ON M4R 1A1
416-485-4417
Monthly: Canada,
Best Food Day

It Makes Sense
BDS Marketing
440 Turnpike St.
Canton MA 02021
617-821-0900
Semi-annually:
New England

National Themed Inserts
General Marketing Corp.
722 Post Road East
Westport CT 06880
203-227-1106
Irregular: National

APPENDIX B

FOR ADDITIONAL INFORMATION...

D'Arcy MacManus Masius
Gateway Tower
One Memorial Drive
St. Louis MO 63102
314-342-8600

Donnelley Marketing
1515 Summer St.
Stamford CT 06905
203-357-8600

Newspaper Advertising Bureau
1180 Ave. of the Americas
New York NY 10036
212-704-4557

Nielsen Clearing House
1900 North 3rd St.
Clinton IA 52732
319-242-4504

Cherry Hill NJ	609-795-5454
Dallas TX	214-669-2100
Hackensack NJ	201-343-3600
Menlo Park CA	415-321-7700
New York NY	212-704-4557
Northbrook IL	312-498-6300

Nielsen Clearing House
160 McNabb Street
Markham ON L3R 4B8 Canada
416-475-3334

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Research Report

[illegible]

Newspaper Advertising Bureau, Inc. 1180 Avenue of the Americas, New York, New York 10036

PRODUCT AND SERVICE USERS:

AVERAGE WEEKDAY AND SUNDAY/WEEKEND

NEWSPAPER COVERAGE

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers. These reports are designed to promote the efficient use of the newspaper medium for the advertising and marketing needs of individual companies.

July 1985

Simmons Market Research Bureau,
1984 Study of Media and Markets

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INTRODUCTION

How to Read the Tables

The tables presented in this report are derived from a special tabulation of the Simmons Market Research Bureau's 1984 Study of Media and Markets.

Each table shows the level of product or service usage for the category described and average single-issue coverage of the daily and Sunday/weekend newspaper among these users, both for the total United States and for all metropolitan areas.

For example, the second line of figures in the first table headed "Alcoholic Beverages: Distilled Spirits and Prepared Cocktail Mixes" shows that 34.6% of all adults report using whiskey. On an average weekday, the daily newspaper reaches 69% of all these users. On an average weekend, the Sunday or weekend newspaper reaches 71%. For all Standard Metropolitan Areas, the average reach of the daily newspaper among whiskey users is 71%, and the average Sunday/weekend reach is 75%.

Additional details on the number of product and service users reached, variations in coverage by level of consumption, etc., are available on request from Newspaper Advertising Bureau.

Making Local Estimates of Product User Coverage

In any market where adult readership figures are available for a particular newspaper or combination of newspapers, these may be used in conjuction with the data presented in this report to obtain estimates of the percentage of local users reached. It should be noted that this is an estimate, since the relationship between newspaper readership and usage may vary from one market to another. However, in the absence of local data on users, this estimate is a reasonable alternative.

National 1984 Simmons figures for average newspaper readership among the total adult population are as follows:

	Total U.S.[1]		All Metros[1]	
	Weekday	Sunday	Weekday	Sunday
Total adults	65%	65%	68%	71%
Total males	66	66	70	71
Total females	64	65	67	71
Total female homemakers	64	65	67	71

Suppose that in a metropolitan market an estimate is needed for the percentage of adult whiskey drinkers reached on an average weekday by a daily newspaper read by 57% of all the adults in the MSA. The first step is to divide the percent of whiskey drinkers reached in all metros (71%) by the percent of total adults reached in all metros (68%). This yields a factor of 1.04. Multiplying this factor by 57% (the reach of the newspaper in question) indicates that a reasonable estimate of the newspaper's coverage of whiskey drinkers in its MSA is 59%.

---

1) Weekday coverage figures shown do not include national newspapers (USA Today, Wall Street Journal).

ALCOHOLIC BEVERAGES: DISTILLED SPIRITS AND PREPARED COCKTAIL MIXES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Drink any distilled liquor (net)	53.7%	68%	70%	70%	74%
Drink any whiskey (subnet)	34.6	69	71	71	75
Bourbon	18.2	66	68	69	73
Canadian	19.2	69	71	71	75
Rye or blends	10.8	69	71	71	75
Scotch	13.5	71	73	73	77
Drink other distilled liquors (subnet)	47.7	68	71	70	74
Gin	16.9	72	75	75	79
Rum	23.0	68	72	70	75
Tequila	13.2	61	69	65	73
Vodka	26.0	69	73	71	77
Cordials or liqueurs	22.0	71	74	72	77
Brandy or cognac	14.0	69	73	71	76
Use prepared cocktail mixes with liquor (bottled or canned)	9.0	64	65	66	69
Use prepared cocktail mixes without liquor	7.6	67	72	69	76

Source: SMRB, 1984 SMM

ALCOHOLIC BEVERAGES: MALT BEVERAGES AND WINES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Drink any malt-based beverage (net)	45.4%	67%	69%	69%	73%
Drink any beer (subnet)	43.6	67	69	69	74
Light/low calorie domestic beer (in cans or bottles)	23.4	68	71	70	75
Regular domestic beer (in cans or bottles)	35.4	67	69	69	73
Regular imported beer (in cans or bottles)	14.8	69	73	69	74
Ale (domestic or imported)	7.5	70	72	71	75
Malt Liquor	8.3	59	61	63	67
Drink any wine (net)	46.0	69	73	71	76
Champagne, cold duck and sparkling wines	26.0	69	73	71	76
Domestic dinner/table wine	30.2	72	75	72	78
Imported dinner/table wine	19.0	70	76	72	78
Aperitif and specialty wines	5.7	69	74	69	75
Sangria/pop/party wines	13.2	66	68	68	73
Reduced calorie domestic dinner/table wines	4.8	69	74	68	77
Port, sherry and dessert wines	18.4	72	74	74	77
Vermouth	5.2	75	76	77	80
Decision maker for brands of wine or liquor served in home	31.4	70	73	71	77

Source: SMRB, 1984 SMM

MEN'S APPAREL
(Total Males)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Bought in last 12 months:					
Any overcoat or topcoat	5.6%	70%	70%	71%	75%
Usually spend $100 or more	2.7	75	76	76	79
Any raincoat or all-weather coat	4.2	70	72	72	78
Usually spend $50 or more	2.5	72	75	74	79
Any winter or all-year suit	10.4	75	74	77	78
Usually spend $150 or more	5.7	76	75	78	78
Any lightweight summer suit	5.5	74	72	76	76
Usually spend $100 or more	3.5	77	75	77	77
Any sport coat or blazer	12.4	75	74	74	78
Usually spend $100 or more	5.2	79	77	77	79
Any heavyweight jacket (not suit type)	8.8	70	69	70	73
Usually spend $50 or more	5.3	72	70	71	73
Any slacks (business, dress)	25.8	72	72	73	76
Usually spend $30 or more	9.6	75	74	75	77
Any dressy, designer jeans	9.6	68	71	71	78
Usually spend $30 or more	3.7	72	73	73	75
Any other jeans	27.8	64	65	68	71
Any regular or dress shirt	26.4	72	72	73	75
Usually spend $20 or more	11.1	75	75	75	77
Any sport shirt	19.2	71	70	73	75
Usually spend $20 or more	7.3	75	71	75	77
Any sweater	13.7	73	74	77	78
Usually spend $30 or more	3.8	76	72	79	78

Source: SMRB, 1984 SMM

MEN'S APPAREL (continued)
(Total Males)

Bought in last 12 months:	Percent of Total Population	Total U.S. Weekday	Total U.S. Sunday	All Metros Weekday	All Metros Sunday
Any leather shoes	31.4%	70	71	73	76
Usually spend $50 or more	11.9	75	74	77	79
Any hiking/climbing boots	4.6	72	73	73	76
Any western/cowboy boots	7.4	64	64	70	71
Any other leather boots	7.9	61	64	61	67
Any sneakers	19.8	69	70	72	75
Usually spend $30 or more	5.5	71	71	72	75
Any canvas shoes	7.4	68	65	71	72
Ski clothes (not boots)	2.6	68	72	70	76
Any swim suit	7.0	71	75	71	78
Any tennis clothing	1.9	70	67	72	69
Any warm-up suit	7.0	71	75	71	78

Source: SMRB, 1984 SMM

WOMEN'S APPAREL
(Total Females)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Bought in last 12 months:					
Blazer or jacket	22.9%	70%	73%	72%	78%
Usually spend $50 or more	7.0	73	76	74	78
One or more cloth coats	14.7	71	73	72	78
Usually spend $75 or more	5.9	75	79	75	80
One or more raincoats/ all-weather coats	12.9	70	71	74	77
Usually spend $75 or more	2.9	76	81	77	82
One or more dresses	38.8	68	70	71	74
Usually spend $50 or more	11.2	73	77	75	79
One or more pants suits	10.5	66	66	67	72
Usually spend $35 or more	5.6	68	70	73	77
Skirt suit (two-piece)	12.8	72	73	74	76
Usually spend $75 or more	5.3	75	78	75	80
One or more blouses/shirts	47.4	68	71	70	76
Usually spend $35 or more	5.8	68	74	69	77
One or more skirts	26.7	69	73	70	77
Usually spend $35 or more	4.8	71	79	72	79
Slacks	39.5	69	72	70	76
Usually spend $35 or more	6.0	70	76	71	78
Dressy/designer jeans	21.2	66	70	67	73
Usually spend $35 or more	5.3	65	70	67	73
Other jeans	26.8	64	68	67	74
Usually spend $35 or more	2.8	66	70	67	74
Sweaters	32.1	70	73	70	76
Usually spend $35 or more	5.2	67	73	69	75
One or more T-shirts	21.1	66	72	68	76
Usually spend $15 or more	5.5	70	74	70	76

Source: SMRB, 1984 SMM

(Continued)

WOMEN'S APPAREL (Continued)
(Total Females)

	Percent Of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Bought in last 12 months:					
Any leather shoes	50.4%	69%	70%	70%	74%
Usually spend $35 or more	19.7	72	75	74	78
Any leather boots	13.1	69	74	70	78
Usually spend $75 or more	3.0	65	73	68	77
Slippers	16.7	70	72	72	78
Any sneakers	24.7	68	70	70	75
Usually spend $35 or more	3.5	70	68	71	71
Any canvas shoes	17.0	66	69	69	74
Any brassieres	44.7	68	70	70	75
Usually spend $35 or more	2.5	73	75	73	77
Any girdles	7.9	76	72	78	79
Any slips	18.4	70	71	71	75
Usually spend $15 or more	4.0	74	78	75	79
Any regular panty hose	42.3	67	69	70	73
Any control-top panty hose	21.3	68	70	69	75
Any support panty hose	12.1	67	70	69	75
Any regular stockings or hose	5.5	67	65	71	71
Knee-high hose (not socks)	34.0	68	70	70	75
Socks	26.0	67	70	69	75
Panty-top panty hose	9.8	68	71	71	78
Swim suit	18.6	67	72	67	74
Usually spend $35 or more	3.4	68	75	68	76
Warm-up suit	15.5	68	72	69	76
Usually spend $25 or more	7.3	71	76	72	80

Source: SMRB, 1984 SMM

APPLIANCES (HOUSEHOLD)
(Total Adults)

Bought in last 12 months:	Percent of Total Population	Total U.S. Weekday	Total U.S. Sunday	All Metros Weekday	All Metros Sunday
Automatic washing machine	6.1%	62%	64%	67%	71%
Separate electric clothes dryer	3.2	62	64	67	71
Vacuum cleaner	6.7	65	67	68	72
Portable room heater	3.0	65	70	69	77
Separate room air conditioner	1.4	68	68	73	75
Ceiling fan	4.6	66	67	71	72
Smoke/fire detector	2.9	69	73	73	79
Sewing machine	1.7	54	62	60	72
Electric refrigerator	5.1	63	68	67	74
Automatic dishwasher: built-in	1.7	74	76	75	79
Garbage disposal	1.4	69	77	68	77
Electric stove or range	1.9	64	63	70	68
Gas stove or range	1.6	63	68	67	77
Electric can opener	2.7	65	68	70	73
Electric mixer: hand-held	1.7	61	63	66	69
Electric blender	2.0	62	67	67	72
Electric food processor	1.6	73	75	76	78
Automatic drip coffee maker	4.6	68	71	70	75

Source: SMRB, 1984 SMM

AUTOMOBILES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Have current driver's license	84.0%	67%	67%	70%	73%
Own any cars	81.9	67	67	70	73
Decision maker for:					
Any car bought new	25.4	72	73	74	77
One car bought new	22.4	72	72	74	76
Two or more bought new	3.0	74	77	77	82
Domestic car bought new	19.9	72	72	75	77
Sub-compact	2.4	77	77	79	81
Compact	3.5	70	74	72	77
Intermediate	5.9	76	74	78	78
Standard	2.6	77	74	81	80
Luxury	1.1	73	72	73	77
Foreign, import bought new	5.9	71	75	72	77
Car bought new in last two years	10.9	72	72	74	77

AUTOMOTIVE PRODUCTS AND SERVICES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Bought or installed in last 12 months:					
New tires for passenger cars	41.0	67%	68%	71%	74%
Five or more tires	6.6	66	71	71	75
Four tires	18.6	66	66	71	74
One to three tires	15.8	68	69	70	74
Car batteries	28.1	66	66	70	73
Mufflers	19.9	70	69	71	75
Spark plugs	29.9	64	66	69	72
Shock absorbers	10.8	66	69	68	73
Air filters	49.3	69	69	71	74
Oil filters	52.4	67	68	71	74
Had transmission serviced	12.1	68	68	70	73

Source: SMRB, 1984 SMM

AUTOMOTIVE: GASOLINE, OIL, ANTI-FREEZE AND CAR RENTALS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Gasoline, diesel fuel usage per week:					
20 or more gallons	25.0%	67%	67%	70%	73%
10 to 19 gallons	35.4	67	68	70	73
9 gallons or less	17.5	65	65	68	72
Buy premium leaded	4.0	66	67	67	71
Buy premium unleaded	19.4	68	69	70	74
Buy regular leaded	27.2	64	64	67	71
Buy regular unleaded	41.8	70	71	72	75
Buy motor oil	62.9	66	67	69	72
Buy gasoline additives	15.7	66	66	69	71
Buy motor oil additives	4.6	62	64	66	70
Buy anti-freeze	68.7	67	67	70	73
Use car wax, polish	43.2	67	68	69	73
Car rentals:					
Rent car for personal or business reasons	8.0%	74%	78%	74%	79%
Rented car 3 or more times in last 12 months	3.0	77	78	77	78

Source: SMRB, 1984 SMM

BEVERAGES: CARBONATED SOFT DRINKS, COFFEE, TEA AND JUICES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Personally drink (total adults):					
Regular cola (not diet)	64.2%	64%	64%	67%	71%
Diet or low-calorie cola	39.4	69	70	71	75
Other regular carbonated soft drinks	54.7	66	67	68	72
Other diet, low-calorie carbonated soft drinks	31.0	70	71	72	76
Use in household (female homemakers):					
Ground coffee (net):	58.4%	67%	68%	71%	75%
Regular (not decaffeinated)	51.8	67	68	71	75
Decaffeinated	22.1	68	70	78	89
Instant or freeze-dried coffee:					
Regular (not decaffeinated)	36.6	66	67	70	73
Decaffeinated	39.7	67	68	71	73
Regular tea	74.3	65	67	70	73
Instant tea (unsweetened)	27.3	67	68	71	74
Instant iced tea mix	29.8	68	70	73	76
Frozen orange juice	63.8	66	68	70	74
Orange juice in cans, bottles or cartons	48.2	65	67	70	72
Tomato, vegetable juices	52.9	67	68	71	74
Other fruit juices and drinks (excluding carbonated)	62.3	65	67	70	73
Herbal tea (bags or packages)	32.4	64	67	69	74
Bottled natural spring or mineral water	12.2	68	72	69	74

Source: SMRB, 1984 SMM

CAMERAS, BINOCULARS, PROJECTORS AND FILM PROCESSING
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Bought still camera in last 12 months	19.9%	68%	68%	71%	74%
Spent $100 or more	6.2	73	76	74	79
Bought movie camers in last 12 months	1.9	66	67	68	70
Binoculars, field glasses ever bought	10.9	75	75	77	80
Movie projector ever bought	5.7	73	74	75	78
Slide projector ever bought	5.7	74	73	74	76
Send or take out film for processing (net)	51.0	69	70	71	75
Use drug store	22.4	69	69	71	74
Use camera store	7.9	73	75	73	77
Use mail order	7.9	69	72	72	78
Use discount store	11.0	68	70	70	76
Use department store	5.2	65	70	67	75
Use photo drive-in	10.6	69	72	70	75

Source: SMRB, 1984 SMM

COOKWARE
(Total Adults)

Bought in last 12 months:	Percent of Total Population	Total U.S. Weekday	Total U.S. Sunday	All Metros Weekday	All Metros Sunday
Wok	4.7%	72%	76%	73%	80%
Electric fry pan	7.7	66	66	68	70
Electric deep fryer	4.5	58	63	64	69
Electric slow cooker	5.8	65	65	70	72
Electric corn popper	7.1	70	70	73	74
Electric toaster	11.0	63	64	66	69
Electric toaster-oven	4.8	72	73	75	75
Electric ice cream maker	2.1	69	70	72	75
Pressure cooker	4.5	63	63	69	69
Porcelain cookware	3.8	65	70	69	73
Metal cookware set	6.4	64	65	67	69
Grill (any separate)*	12.6	67	69	69	73
Charcoal grill	8.3	66	67	68	72
Gas grill	4.1	71	74	72	76

* Electric grill data not shown because of small base.

Source: SMRB, 1984 SMM

DINNERWARE, FLATWARE
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Bought last 12 months:					
Sterling silver flatware	1.4%	65%	63%	67%	67%
Stainless steel flatware	5.5	65	68	71	73
Crystal	4.6	69	74	72	78
Glassware (not crystal)	5.7	68	70	70	73
Fine china	3.0	71	75	71	77
Stoneware dinnerware	4.9	69	70	72	75
Other dinnerware	4.1	63	69	67	74

Source: SMRB, 1984 SMM

DRAPERIES, CURTAINS, TOWELS, LINENS
(Total Adults)

Bought in last 12 months:	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Ready-made draperies, curtains	9.0%	70%	71%	73%	76%
Spent $150 or more	2.0	75	78	78	83
Custom draperies, curtains	3.0	71	75	73	78
Spent $150 or more	2.0	72	78	74	80
Towels	25.8	69	70	71	75
Spent $25 or more	10.9	71	74	74	78
Sheets, pillowcases	25.7	70	71	72	76
Spent $25 or more	14.9	71	74	76	80
Comforters, quilts	8.9	67	73	70	77
Spent $25 or more	4.2	68	75	70	78
Electric blankets	5.2	68	70	71	76
Spent $25 or more	4.3	67	70	71	76
Other blankets	7.1	65	66	68	72
Spent $25 or more	2.8	69	72	74	79
Tablecloths and napkins	13.4	68	71	71	76
Spent $25 or more	4.1	72	76	74	78

Source: SMRB, 1984 SMM

ELECTRONICS: STEREO, TELEPHONES, CALCULATORS, TYPEWRITERS
(Total Adults)

	Percent of Total Respondents	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Ever bought:					
Compact or console stereo	15.5%	70%	71%	70%	71%
Digital clock radio	4.0	69	72	72	76
Portable walkabout radio/player	7.9	72	73	69	74
Separate components when purchased:					
Stereo receiver/tuner/amplifier	13.9	69	73	71	77
Separate stereo tuner	5.8	67	74	68	75
Separate stereo amplifier	5.8	67	73	68	75
Stereo speaker(s)	12.9	67	73	68	76
Turntable	11.9	68	74	70	77
Cassette deck	9.9	67	72	69	75
Telephones ever bought:					
Cordless telephone	6.2	71	73	72	76
Telephone from company store	12.1	68	68	70	73
Telephone from retail store	13.0	70	71	72	75
Telephone answering machine	3.5	69	73	72	76
Bought in last 12 months:					
Pocket or hand-held calculator	16.7	68	70	72	75
Desk top calculator	4.7	69	70	71	74
Electric portable typewriter	5.7	72	74	73	79
Own home, personal computer	9.3	70	72	71	75
Bought 1 to 4 software programs	4.4	69	70	72	74
Bought 5 or more software programs	2.2	70	76	70	80

Source: SMRB, 1984 SMM

FAST FOOD, DRIVE-IN, FAMILY AND STEAK HOUSE RESTAURANTS

(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
All users	86.5%	67%	67%	69%	72%
Number of times past 30 days:					
Heavy (10 or more times)	29.2	67	69	69	73
Medium (4 to 9 times)	35.3	68	69	71	74
Light (3 times or less)	21.9	64	63	67	70
Types visited:					
Cafeteria	17.3	67	67	70	71
Fast food, drive-in	64.8	67	68	68	73
Family restaurant	41.6	68	68	70	73
Steak house	30.8	68	68	70	73
Theme restaurant	9.5	67	71	68	74
Other restaurants	20.4	68	71	70	75
Chains or franchises visited:					
Arby's	14.3	68	72	70	76
Big Boy	10.7	68	70	70	74
Burger King	39.9	68	70	70	74
Dairy Queen	17.7	64	66	66	72
Denny's	13.1	68	71	69	73
Dunkin' Donuts	10.8	69	74	70	76
Hardee	13.9	63	61	67	66
Kentucky Fried Chicken	29.3	65	66	67	72
Long John Silver	13.5	66	69	66	74
McDonald's	54.5	67	69	69	73
Pizza Hut	23.2	64	66	66	71
Ponderosa Steak House	11.6	70	73	71	76
Red Lobster Inns	13.8	70	74	71	77
Sizzler Family Steak House	12.6	66	68	68	71
Taco Bell	15.7	62	68	63	71
Wendy's Old Fashioned Hamburgers	27.5	67	70	69	74

Source: SMRB, 1984 SMM

FINANCE: BANKING AND INVESTMENTS

(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Have checking account at commercial bank	43.3%	68%	69%	70%	74%
Checking account at savings bank or savings and loan association	20.3	69	71	72	75
Automatic 24-hour teller card	18.4	69	73	70	76
Savings account at commercial bank	21.4	69	71	71	75
Savings account at savings bank or savings and loan association	20.4	73	74	75	78
IRA or Keogh plan	13.0	77	80	77	82
Christmas or Chanukah Club	6.1	72	73	74	77
Six-month savings certificates or CDs	6.4	77	75	80	80
Personal loan from a bank	9.5	68	68	71	76
Personal loan from a finance company	3.8	65	67	64	71
Auto loan from a bank	7.8	69	70	70	76
Auto loan from an auto dealer	3.3	67	73	69	76
Mortgage from a bank	7.2	73	78	75	81
Mortage from a savings and loan	8.2	73	75	74	79
Gold or gold coins	2.2	75	75	76	76
Silver or silver coins	5.2	72	74	74	78
Vacation or weekend home (owned)	2.4	71	69	73	73
Investment property	4.1	73	73	75	79

Source: SMRB, 1984 SMM

FINANCE: CREDIT CARDS AND SECURITIES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Own any credit cards:	56.2%	71%	72%	72%	76%
Used any last 3 months	41.4	72	74	73	77
Used any last 30 days	28.4	72	75	73	78
Auto rental card	1.4	79	84	80	84
Gasoline credit card	19.7	73	74	75	77
Telephone credit card	11.4	72	73	74	77
American Express (green)	5.1	75	81	77	84
Master Card/Mastercharge	21.4	73	76	74	78
Visa	26.4	73	75	74	78
Other bank credit cards	2.0	76	73	78	77
J. C. Penney	20,0	72	74	73	78
Montgomery Ward	11.6	69	71	71	76
Sears	28.2	71	74	73	78
Other department store credit cards	24.4	74	77	75	79
Total value of self-purchased securities:*					
Under $5,000	4.5	72	73	74	75
$5,000 - $24,000	4.8	76	75	79	78
$25,000 or more	3.6	77	79	80	84
Have account with stockbroker, brokerage firm	6.3	76	78	77	79
Money market funds at a bank	4.7	78	76	80	78
Money market funds at brokerage firm	2.1	75	81	75	82

* Excludes U.S. Savings Bonds.

Source: SMRB, 1984 SMM

FINANCE: INSURANCE
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Have homeowners or tenant's insurance	52.9%	70%	70%	73%	76%
Less than $25,000	11.8	64	64	68	71
$25,000 - $49,999	13.5	69	67	71	72
$50,000 or more	27.6	73	75	75	79
Have medical, hospital or health insurance	70.5	68	68	71	73
Place of work or union	46.0	70	71	72	76
Through an agent	5.0	68	64	73	73
Direct from insurance company	5.3	66	68	69	72
Have life insurance	63.3	70	69	72	74
Less than $10,000	15.8	67	63	70	70
$10,000 - $29,999	17.7	66	65	70	73
$30,000 or more	29.8	75	75	75	78
Have life insurance through an agent	17.2	71	71	72	77
Have vision care insurance	5.4	73	74	75	77
Have insurance against loss of income	4.8	71	72	75	78
Have dental insurance	13.7	71	74	73	77
Have travel insurance	3.3	74	72	76	77
Have personal liability insurance	7.1	74	71	75	78

Source: SMRB, 1984 SMM

FOOD: GROCERY EXPENDITURES AND CENTS-OFF COUPONS

(Female Homemakers)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Any major food shopping last 4 weeks	77.1%	65%	65%	68%	71%
5 or more times	18.1	70	67	73	73
4 times	25.5	66	67	69	72
1-3 times	33.5	62	64	65	69
Amount spent in average week:					
$40 or less	27.1	56	57	60	61
$41 - $60	27.7	64	64	68	71
$61 - $80	20.2	65	66	70	73
$81 or more	25.0	70	74	74	77
Use any cents-off coupons	68.2	67	68	71	75
Cents-off coupons from newspapers	59.6	69	70	72	76
Cents-off coupons from magazines	44.8	68	70	73	76
Cents-off coupons from mail	46.7	68	70	72	75
Cents-off coupons in/on packages	40.8	67	69	71	75

Source: SMRB, 1984 SMM

FOOD: CEREALS, VEGETABLES, RICE, FRUITS, PASTA AND PIZZAS

(Female Homemakers)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Use in household:					
Any cold cereals	86.6%	64%	66%	69%	72%
Any hot cereals	70.4	64	65	69	72
Baked beans (in jars or cans)	63.5	67	68	70	74
Rice	83.3	65	66	69	72
Canned spaghetti and macaroni products	38.5	63	64	68	71
Frozen pizzas	47.4	65	67	69	72
Spaghetti sauce (in jars or cans)	61.7	66	67	70	73
Canned or jarred fruits	77.3	65	67	70	73
Frozen potato products	55.0	65	67	71	74
Frozen vegetables (not potatoes, corn on cob)	70.7	67	69	71	74
Mexican food & ingredients	46.6	64	67	68	73
SNACKS AND CRACKERS					
Saltines, flavored snack crackers, graham crackers	86.5	65	66	69	72
Potato chips	75.4	65	67	69	73
Corn and tortilla chips/snacks	63.4	64	67	68	73

Source: SMRB, 1984 SMM

FOOD: DAIRY PRODUCTS, SPREADS, COOKIES, AND DESSERTS

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
All Adults: (Personally use)					
Frozen yogurt	10.6%	66%	71%	68%	74%
Yogurt (not frozen)	30.8	67	70	69	73
Female Homemakers: (Use in household)					
Butter	52.5	66	68	71	74
Jams and jellies	86.7	64	66	69	72
Peanut butter	87.4	64	66	69	72
Cottage cheese	65.8	67	69	71	74
Diet or low calorie American/ pasteurized process cheese	17.5	66	65	71	74
American/pasteurized process cheese (not diet)	75.3	65	66	70	73
Natural cheese (other than American)	70.8	66	68	70	73
Spread cheese	29.3	67	71	72	76
Margarine	86.8	64	66	68	72
Non-dairy cream substitute	30.0	66	67	70	73
Ice cream, ice milk, sherbet	84.2	65	67	69	73
Frozen dessert pies, cakes, pastries	40.0	68	68	72	74
Whipped topping (cream type)	67.9	65	67	70	74
Dry cake mixes	70.4	65	67	70	74
Flavored gelatin desserts	74.2	66	67	71	73
Frozen waffles	29.4	68	71	73	76
Ready-to-spread frosting	31.3	65	67	70	74

Source: SMRB, 1984 SMM

FOOD: SOUPS, MEAT, FISH, DRESSINGS AND CONDIMENTS
(Female Homemakers)

Use in household:	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Any dry soup/lunch mix or bouillon cubes	51.5%	68%	70%	72%	76%
Canned soup	83.2	65	67	69	73
Frozen main courses (casseroles or entrees)	34.6	68	70	71	75
Frozen complete dinners (TV dinners)	35.3	65	66	69	72
Frozen prepared seafood	36.8	68	69	71	74
Complete package prepared dishes (with macaroni, noodles or spaghetti)	47.9	64	65	69	72
Canned ham	41.9	67	67	72	73
Frankfurters and wieners	82.0	65	66	69	72
Cold cuts (packaged or fresh-cut)	76.7	66	67	70	73
Pork sausages	65.1	65	66	70	73
Mayonnaise or mayonnaise-type salad dressing	88.7	65	66	69	72
Liquid prepared salad dressing	75.2	66	68	70	74
Dry mix salad dressing	30.3	67	69	71	75
Salad or cooking oil (excluding olive oil)	86.9	65	66	69	73
Prepared barbecue or seasoning sauce	68.2	65	67	70	73
Catsup	89.6	65	66	69	72
Mustard	86.8	65	67	70	73

Source: SMRB, 1984 SMM

FURNITURE, CARPETING AND FLOOR TILE
(Total Adults)

Bought in last 12 months:	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Recliner chair	5.2%	68%	71%	71%	79%
Spent $150 or more	4.1	70	73	73	81
Sofa bed/convertible	3.2	68	71	70	75
Spent $250 or more	2.3	70	74	74	79
Other living room furniture	9.3	67	68	68	72
Spent $500 or more	4.2	69	70	70	73
Mattresses (excluding box springs)	9.6	67	70	70	74
Beds	6.8	64	68	67	72
Spent $250 or more	3.4	68	72	70	75
Other bedroom furniture	4.9	64	71	69	75
Spent $250 or more	2.5	68	76	73	78
Dining room furniture	4.4	65	67	67	72
Spent $250 or more	2.8	66	72	66	75
Lawn/porch furniture	5.6	75	74	76	78
Wall-to-wall carpeting/ room-size rugs	8.8	70	75	73	79
Indoor-outdoor carpeting	1.8	70	67	71	71
No-wax sheet vinyl flooring	3.4	68	71	72	78
No-wax floor tile	1.9	68	75	71	81

Source: SMRB, 1984 SMM

HEALTH CARE PRODUCTS, ORAL HYGIENE PRODUCTS AND OVER-THE-COUNTER REMEDIES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Wear prescription eyeglasses	55.2%	69%	68%	72%	74%
Wear soft contact lenses	6.5	67	70	69	73
Wear hard contact lenses	3.1	68	71	69	73
Use:					
Breath freshener	51.3	65	65	68	71
Denture cleansers	21.7	65	62	70	70
Mouthwash	64.8	66	65	69	71
Toothpaste	94.2	66	66	69	72
Use:					
Adhesive bandages	81.1	67	67	69	72
Athlete's foot remedies	15.7	68	66	70	74
Cold and allergy remedies	63.9	65	67	68	72
Cough drops	33.8	68	68	71	73
Medicated throat lozenges	51.4	65	66	69	72
Eye drops and eye wash	35.6	64	65	68	70
Headache remedies, pain relievers	83.6	66	66	69	72
Indigestion aids, upset stomach remedies	56.0	67	66	69	72
Nasal sprays	22.3	66	66	69	72
Pain relieving rubs and liquids	29.4	64	64	68	71
Suntan and sunscreen products	43.3	67	70	70	74
Vitamin capsules, tablets, liquids	47.7	67	68	69	72

Source: SMRB, 1984 SMM

HOME IMPROVEMENTS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
In last 12 months:					
Had any rooms painted	30.4%	69%	70%	71%	76%
Interior wall paint: latex or water base	25.2	69	71	71	76
Interior wall paint: oil base	5.1	70	67	74	75
Had outside of house painted	14.3	70	70	71	74
Latex or water base paint	7.5	72	73	72	77
Oil base paint	3.8	69	68	72	73
Stain	2.6	68	69	70	75
Bought in last 12 months:					
Ceiling tile	1.4	71	69	75	76
Outdoor/exterior siding	1.7	66	69	69	79
Wall paneling	3.6	68	68	73	74
Roofing	4.6	70	69	74	79
Storm doors or windows	4.5	73	74	75	81
Wall paper	11.4	71	74	74	79
Kitchen cabinets	2.2	71	69	75	75
Kitchen sinks	2.3	67	67	72	74
Bathroom plumbing fixtures	7.7	70	72	72	79
Indoor lighting fixtures	7.6	69	72	70	76
Outdoor lighting fixtures	3.0	68	68	71	72
Furnace	1.3	67	73	66	78
Garage door opener	1.8	72	74	69	78
Hot water heater	3.6	65	68	69	77
Insulation for ceiling, floor or wall	3.7	68	71	71	76

Source: SMRB, 1984 SMM

HOUSEHOLD SUPPLIES: SOAPS, DETERGENTS, CLEANERS, DEODORIZERS AND PAPER PRODUCTS

(Female Homemakers)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Soaps and detergents for regular laundry	91.3%	64%	66%	69%	72%
Soaps and detergents for fine fabrics	69.4	65	67	70	74
Laundry boosters, pre-soaks and pre-cleaners	51.9	67	68	71	74
Bleach	71.2	65	66	69	72
Fabric softeners	70.6	66	67	70	73
Automatic dishwashing detergent	34.3	70	74	75	79
Household cleaners (including kitchen and bath)	73.1	65	67	69	72
Oven cleaners	56.9	64	66	69	73
In-bowl toilet cleaners	50.6	67	68	71	73
Floor wax and polish	39.2	67	68	71	75
Furniture polish	81.4	65	67	70	73
Air freshener sprays and room deodorizers	64.0	65	66	70	72
Rug deodorizers and fresheners	36.7	64	66	69	72
Rug cleaners and shampoos	41.3	66	67	71	74
Facial tissues	80.3	67	68	71	74
Paper towels	88.5	65	66	69	72
Plastic garbage bags and trash can liners	60.8	64	66	69	73
Plastic type kitchen wraps	74.5	66	68	70	73
Aluminum foil	91.0	64	66	68	72

Source: SMRB, 1984 SMM

JEWELRY AND LUGGAGE

(Total Adults)

Bought in last 12 months:	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Men's new wristwatch (digital face)	8.6%	65%	65%	68%	70%
Women's new wristwatch (digital face)	7.2	63	65	66	70
Men's new wristwatch (dial face)	3.4	71	70	73	76
Women's new wristwatch (dial face)	4.1	70	71	73	76
Women's diamond ring	3.0	65	68	69	74
Gold jewelry (not filled or plated)	8.9	69	73	71	76
Other jewelry and gems (not costume)	6.1	68	72	72	76
Luggage or baggage	12.5	72	73	73	76
Spent less than $50	4.5	70	69	71	74
Spent $50 - $99	4.0	72	73	73	74
Spent $100 or more	3.9	75	78	77	79

Source: SMRB, 1984 SMM

LEISURE ACTIVITIES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Entertainment:					
Went to movies last 90 days	34.6%	69%	71%	70%	74%
Went to movies last 30 days					
Twice	5.4	72	74	72	76
Three or more times	5.9	70	71	71	73
Last 12 months, went to:					
Live theater performance	13.5	76	79	77	81
Concert	16.3	70	72	71	75
Theater/concert once	8.3	69	71	71	77
Theater/concert 2-3 times	9.9	73	74	74	77
Theater/concert 4 or more times	7.0	74	78	75	80
Participation in last 12 months:					
Adult education courses	7.7	69	73	70	76
Card games	26.5	68	70	71	75
Coin collecting	2.8	70	71	72	73
Cooking for fun	26.8	67	69	69	74
Indoor gardening and plants	24.6	67	71	70	75
Needlework	16.2	68	69	71	74
Outdoor gardening	32.2	69	70	72	75
Painting, drawing, sculpting	6.6	61	69	62	72
Photography	11.0	70	74	70	77
Woodworking	7.0	65	67	67	72

Source: SMRB, 1984 SMM

PET OWNERSHIP, PET FOOD USAGE
(Female Homemakers)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Own one or more dogs:	38.2%	66%	66%	70%	73%
Use canned dog food	18.2	69	69	72	74
Use packaged moist dog food	12.4	68	68	72	74
Packaged dry dog food	29.5	66	67	70	74
Dog biscuits or treats	21.8	72	73	74	77
Own one or more cats:	22.5	66	67	70	74
Canned cat food	12.6	69	70	72	75
Packaged moist cat food	9.2	68	69	71	75
Packaged dry cat food	16.3	67	69	71	76
Use flea and tick care products for dogs and cats	33.1	67	68	70	74

Source: SMRB, 1984 SMM

POWER EQUIPMENT AND TOOLS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Items owned:					
Garden tiller	10.3%	70%	66%	73%	74%
Garden tractor	4.0	71	69	76	75
Riding tractor-type lawn mower	10.2	70	67	73	73
Gas/walk-behind mower	32.2	71	71	73	77
Electric/walk-behind mower	4.1	74	75	75	79
Electric drill	33.7	70	72	72	77
Electric router	8.6	72	72	74	75
Gas chain saw	15.0	68	66	72	74
Electric chain saw	5.3	76	76	77	79
Portable electric circular saw	19.0	70	72	73	78
Portable electric jig/sabre saw	16.1	70	71	72	77
Stationary radial/arm saw	4.2	74	74	77	79
Bench/table circular saw	6.8	73	73	75	76
Stationary jig/sabre saw	2.8	70	70	73	76
Electric sander	18.0	72	74	74	77
Snow blower	7.0	80	81	82	85

Source: SMRB, 1984 SMM

PUBLIC ACTIVITIES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
In last 12 months:					
Voted in federal, state or local election	33.3%	74%	73%	74%	77%
Wrote to magazine or newspaper editor	3.7	74	76	75	77
Wrote or phoned radio or TV station	5.6	69	70	72	77
Wrote to elected official	6.1	75	77	75	79
Wrote something that was published	2.0	75	73	74	79
Addressed public meeting	4.5	75	77	77	78
Active in local civic issue	3.8	78	78	78	81
Worked for political party or candidate	2.3	77	80	76	79
Fund raising	6.2	74	75	75	77
Worked as non-political volunteer	8.4	73	74	73	77
Memberships:					
School or college board	2.1	76	73	77	77
Church board	5.6	70	65	74	72
Business clubs	2.7	74	74	76	78
Union	6.0	74	73	77	77
Fraternal orders	5.3	75	74	80	80
Religious clubs	2.6	77	76	79	80
Civic clubs	1.7	80	75	79	78
Veterans' clubs	3.7	73	72	76	80
Country club	2.4	78	78	78	82
Health club	5.1	71	74	71	76
Enviromentalist organization	1.4	71	75	75	76

Source: SMRB, 1984 SMM

OWNERSHIP OF RECREATIONAL ITEMS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Canoe (not inflatable)	2.4%	69%	70%	72%	74%
Inflatable boat	2.4	69	73	71	78
Outboard power boat	4.9	69	70	73	76
Rowboat (not inflatable)	2.3	75	71	75	77
Snowmobile	2.8	67	65	69	73
Towable trailer or camper	3.4	69	67	71	73
Truck-mounted camper	2.8	62	67	71	73
Swimming pool above ground	2.4	71	74	71	78
Swimming pool in ground	2.2	73	74	72	76

OWNERSHIP OF SPORTING GOODS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Bicycle	18.3%	69	72	70	76
Bowling ball	11.5	71	74	72	77
Fishing rod--fresh water	20.0	67	68	70	73
Fishing rod--salt water	6.6	70	69	72	72
Golf clubs--irons	9.1	77	79	78	81
Jogging or running shoes	15.0	71	72	72	75
Rifle for hunting	10.5	64	67	66	72
Shotgun for hunting	10.8	65	64	68	71
Target gun	4.5	65	68	68	73
(Snow) skis	4.9	73	77	73	79
Ski boots	4.5	72	76	73	77
Water skis	2.2	73	74	73	74
Tennis racquet	13.2	70	73	71	75
Tent/camping equipment	11.0	69	73	70	76
Stationary bicycle	4.9	76	77	77	80
Weightlifting equipment	8.3	68	69	70	74

Source: SMRB, 1984 SMM

SPORTS, PHYSICAL FITNESS PROGRAMS AND OUTDOOR ACTIVITIES

(Total Adults)

Participated in last 12 months:	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Bicycling	15.3%	68%	71%	69%	75%
Bowling	18.3	70	71	72	76
Camping trips (overnight)	11.1	69	72	69	75
Fishing, fresh water	16.2	67	68	69	72
Fishing, salt water	4.3	70	71	72	72
Golf	8.9	77	78	77	81
Hiking	8.9	68	72	70	74
Hunting	7.0	64	65	66	70
Ice skating	4.0	70	73	74	75
Jogging	11.3	68	69	70	73
Motorcycling	5.6	63	67	70	74
Physical fitness program in home	19.8	68	70	69	73
Physical fitness program out of home	16.3	68	72	70	75
Power boating	6.9	71	75	73	78
Racquet ball	5.3	70	74	71	77
Roller skating	7.2	64	68	66	71
Sailing	3.5	71	73	72	75
Skiing, downhill	4.3	71	75	72	78
Swimming	31.1	68	71	69	74
Tennis	8.0	68	73	69	75
Water skiing	4.9	65	70	67	76
Weight lifting	8.8	67	70	70	74

Source: SMRB, 1984 SMM

TELEVISION EQUIPMENT AND SERVICES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Owned:					
One TV set	36.1%	58%	58%	62%	65%
Two TV sets	32.4	70	70	71	75
Three or more TV sets	22.5	73	75	75	79
Video cassette recorder/player	11.7	70	69	72	76
Amount spent for TV set:					
Under $100	24.8	65	67	69	72
$100 - $299	39.9	68	70	71	74
$300 - $499	41.1	69	69	71	74
$500 & over	39.4	68	69	72	74
Type of TV set:					
B&W floor model	3.0	65	62	69	69
B&W table model	31.1	67	68	70	73
Color floor model	41.6	68	68	71	74
Color table model	59.1	68	70	71	74
Bought last 12 months:					
Video cassette recorder/player	5.5	69	71	73	76
Any cassette tapes or discs	7.8	70	72	76	78
TV set	23.6	67	67	71	74
Blank VCR tape	5.7	73	73	78	80
Rented last 12 months:					
Any pre-recorded VCR tape	6.4	71	73	74	77
Subscribe to cable TV	39.9	70	70	72	76

Source: SMRB, 1984 SMM

TOBACCO: CIGARETTES, DISPOSABLE LIGHTERS, CIGARS AND PIPES

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Adults:					
Smoke cigarettes:	34.0%	63%	64%	67%	70%
Heavy user (30 or more per day)	6.6	67	69	71	74
Medium user (20 to 29 per day)	10.8	63	64	67	70
Light user (19 or less per day)	16.6	62	63	65	69
Smoke filter cigarettes	30.5	63	65	67	71
Smoke non-filter cigarettes	2.6	63	63	69	70
Smoke low tar cigarettes	22.2	64	66	68	72
Menthol filter:	12.3	63	65	67	71
100 mm or more	7.7	63	65	67	71
85 mm or less	5.9	62	66	67	72
Non-menthol filter:	21.7	63	64	67	70
100 mm or more	12.1	64	65	67	70
85 mm or less	12.1	61	62	67	70
Bought disposable lighters in last 12 months	36.4	63	65	67	71
Males:					
Smoke regular size cigars	3.9%	68%	67%	74%	72%
Smoke cigarillos, little cigars	3.3	64	64	66	68
Smoke pipe tobacco	5.1	72	72	71	77
Use chewing tobacco	6.0	62	58	67	66
Use snuff (smokeless tobacco)	3.0	62	58	71	70

Source: SMRB, 1984 SMM

TOILETRIES: BEAUTY AIDS, COSMETICS AND PERSONAL PRODUCTS

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Female users:					
Blusher	65.8%	65%	68%	67%	73%
Eye liner	39.9	65	68	67	73
Eye shadow	56.2	65	68	67	73
Facial moisturizers	60.8	66	68	68	73
Foundation make-up	55.8	66	68	69	72
Lipstick or lip gloss	75.2	66	68	68	73
Mascara	48.0	64	68	66	73
Nail polish	64.4	65	68	68	73
Loose face powder	24.5	65	65	67	71
Pressed face powder	23.7	67	69	70	75
Cologne	62.9	66	68	68	73
Perfume	45.4	63	65	66	71
Toilet water	7.7	70	73	72	77
Feminine hygiene douches	32.6	62	64	65	71
Sanitary pads or napkins	44.4	63	68	65	71
Tampons	33.9	62	67	65	72

Source: SMRB, 1984 SMM

TOILETRIES: HAIR CARE, SKIN CARE AND SHAVING PRODUCTS

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Adult users:					
Hand and body cream, lotion or oil	72.1%	65%	66%	68%	71%
Medicated skin care products	42.4	65	65	68	71
Deodorants or anti-perspirants	90.7	66	66	69	72
Shampoo	90.1	65	66	68	71
Creme hair rinse, conditioners	53.5	64	66	67	71
Hair sprays	42.0	66	66	69	72
Hair coloring products	17.4	67	66	71	74
Home permanents	15.4	60	60	64	68
Disposable razors	52.1	64	66	67	71
Electric and battery shavers	22.3	69	69	72	74
Shaving cream or gel	41.8	66	67	70	72
Male users:					
After-shave lotion or cologne	69.9	67	66	70	72
Hair tonic or dressing	21.7	66	64	70	71
Female users:					
Cleansing creams or lotions	58.9	65	66	68	72
Depilatories	16.5	66	69	68	72

Source: SMRB, 1984 SMM

TRAVEL: DOMESTIC TRAVEL (TRIPS OF 100 MILES OR MORE ONE WAY)
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Took one or more trips last 12 months:	53.5%	70%	71%	72%	76%
One trip	17.8	69	69	72	74
Two-three trips	18.4	70	72	73	77
Four or more trips	17.2	71	73	73	77
Reason for trips:					
Business	8.6	71	75	71	77
Vacation	36.0	71	73	73	77
Personal (not vacation)	21.2	69	68	71	74
Number of airline round trips:					
One	9.9	70	75	71	77
Two	3.2	70	76	74	80
Three or more	3.3	72	75	76	80
Traveled by scheduled plane	13.8	72	76	73	78
Traveled by charter plane	2.8	74	80	73	80
Stayed at any hotel/motel	42.8	70	72	72	76
One-three nights	16.1	68	68	70	74
Four-nine nights	12.9	69	72	70	76
Ten or more nights	12.8	74	76	76	79
Purchased travelers checks	14.4	72	74	73	77
$600 or more	5.9	73	77	76	80
$300 to $599	5.3	73	74	73	76
Less than $300	3.2	67	69	70	73
Used travel agent	10.2	75	77	76	79

Source: SMRB, 1984 SMM

TRAVEL: FOREIGN TRAVEL*
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Weekday	Sunday	Weekday	Sunday
Own currently valid passport	10.5%	70%	74%	71%	76%
One or more trips past 3 years:*	15.8	70	74	70	75
Any business trip	1.8	75	78	75	78
Any vacation trip	11.0	70	75	70	76
Any personal trip (not vacation)	2.1	64	66	64	66
Mode of transportation:					
Scheduled plane	10.0	72	75	72	77
Charter plane	2.7	69	79	69	79
Cruise ship	1.4	72	76	73	79
Number of trips by plane:					
One round trip	6.6	71	76	69	75
Two or more round trips	4.7	72	74	72	75
Destination:					
Canada	4.3	72	74	73	77
Mexico	3.1	62	70	62	72
Hawaii	2.7	72	77	72	78
United Kingdom	1.8	71	78	71	80
Used travel agent	9.1	74	76	74	78

Source: SMRB, 1984 SMM

* Includes travel to Alaska, Hawaii, Puerto Rico and U.S. Virgin Islands.